

ATTACHMENT F
Technical Proposal
RFP 21-67147
for
Managed Services Provider (MSP)

Instructions: Please supply all requested information in the areas shaded yellow and indicate any attachments that have been included to support your responses.

2.4.1 General Requirements & Definitions

- 2.4.1.1 Please confirm your understanding and acceptance of all definitions and abbreviations listed in RFP Section 1.2.

CAI confirms understanding and acceptance of all definitions and abbreviations listed in RFP Section 1.2. Please note that for purposes of our response, we may use the terms “provider” and “vendor” interchangeably, such as when referring to our network of providers. As directed by the RFP, we understand the term subcontractor to be specific to Attachments A and A1.

- 2.4.1.2 Please list any additional terms and definitions used by your company or industry that you would like the State to consider incorporating in the contract. The State will not accept terms and definitions introduced after award during contract finalization and implementation.

For purposes of our response, we do make the following distinction in terms:

Candidate – a individual being considered for placement

Resource – a candidate that has been placed with the hiring agency

Vendor – the firms making up the MSP network. We also refer to these firms as providers.

Contractor – refers to the prime contractor providing the MSP services

Associate – refer to non-W2 contracted resources placed through CAI on staffing contracts

- 2.4.1.3 Please confirm you have carefully reviewed all requirements listed in RFP Section 1.4. Should your company have any exceptions, substitutions, or conditions for the State’s consideration, please list them below. The State will not accept exceptions, substitutions, or conditions introduced after award, during contract finalization and implementation.

Our company has carefully reviewed all requirements listed in RFP Section 1.4, and we do not request any exceptions, substitutions or conditions to the content presented.

At the program level, CAI's Senior Account Manager meets weekly with IDOA management to review program metrics, resolve program issues, and identify needed process changes and/or program enhancements. Our Account Managers are available to IDOA at any time, day or night; regular phone discussions occur outside of the weekly meetings. Our Quarterly Business Review meetings allow for open communication between CAI and other IDOA leaders. IDOA will also have direct and ongoing access to Linda Leiby, Vice President, CWS Solutions, for ad-hoc reporting needs, issue resolution, and insight from our other state MSP programs.

At the agency level, both our Contract Manager and Account Managers are available for direct contact through face-to-face meetings, email, phone, and via the VMS. We expect them to participate in agency meetings where an agency may forecast its IT requirements for current and future projects. Our Account Managers engage consistently with IDOA managers and other stakeholders. We are there to support the entire hiring process, to identify future needs, to assist with planning activities that may require additional levels of staffing effort, and to understand each agency's specific environment and processes. This interaction is a constant; we engage frequently – at the request of the Agency – for support, to deliver reports and market-related information, and to maintain the working relationship, which is of equal importance.

During vacation periods, one manager may support the other, but the State Hiring Manager will use the same point of contact. Our team of Account Managers will be available to meet with the Hiring Managers or IDOA – on-site, local, or remote – when needed. CAI has proven experience delivering account management oversight to deliver a positive client experience. For example, in March 2020 the entire practice pivoted to fully remote operations in response to pandemic restrictions with no downtime. Their experience in a customer-focused environment will be key to working alongside IDOA staff as we develop the program.

Communications

CAI makes communication a focal point to drive change, improvement, and performance through open and honest dialogue. The relationships we form between IDOA stakeholders, providers, and CAI staff will become a vital tool for success.

During the implementation period, CAI will engage in regular communication with IDOA and key stakeholders to provide status updates on our transition. Progress will be monitored and reported on so stakeholders can measure tasks completed against our target implementation schedule. The weekly reports will cover tasks completed, tasks outstanding, unresolved issues, closed issues, and number of Resources transitioned. This will be presented in an easy-to-digest format to allow stakeholders to gain a quick appreciation of all developments. We will also discuss stakeholder requirements and if changes need to be made to the implementation schedule. These will be updated in a revised implementation schedule, acknowledging any changes in timeline or delivery. The changes will be mutually agreed to by both parties and documented.

As part of our customer communication approach, we also need to consider our communication with our provider network. This pool of companies brings the expertise that allows IDOA to deliver their IT projects. We treat them as customers in the same way as we do IDOA and IDOA agencies, providing the same level of commitment and integrity to their growth and development as we do to the program's overall growth and development. Along with our daily phone and email communications with provider representatives, our local team meets regularly with both large and SDB/VBE local staffing firms to review performance and provide coaching for success. For non-local companies, we schedule meetings via phone or MS Teams for the same purpose. We send weekly email communications to the whole network providing updates on current requirements, policy reminders, or helpful tips for success in the program. Our provider network will attest to our ongoing, open lines of communication as it has brought them value and guidance to be more successful.

2.4.2.3 Please describe how the Account Management Team's performance will be

measured, including the use of Customer Satisfaction Surveys.

CAI's overall performance as the MSP is contractually measured through defined SLAs. 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.

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.

We measure client satisfaction on a quarterly basis by surveying agencies participating in the MSP program. Additionally, as required by SLA #8 in RFP Attachment H, we will survey the satisfaction of the Hiring Manager monthly, highlighting positive and negative points about the Hiring Manager's experience in order to identify areas for improvement. Results of surveys will be compiled for State review every reporting period.

We customize the Client Satisfaction Survey templates in collaboration with IDOA. For IDOA we recommend assessing satisfaction with:

- MSP Program (general)
- MSP Workflow
- Vendor Management System
- Candidate Pool
- CAI as MSP Service Provider (general)
- CAI Management

We can discuss additional criteria as part of implementation. We recommend that surveys be a maximum of eight questions, available for assessment with minimum clicks.

2.4.2.4 Please describe the Account Management Team's process for issue management/escalation and resolution.

Through our years of experience providing MSP services, we have discovered that there are typically four distinct areas in which issues or problems can occur with an MSP program: Contract, Workflow, VMS, and Vendor Management. To better address the specifics behind each type of issue and gain attention from the appropriate individuals, each area has a clear escalation path to resolution. Upon classifying an issue into one of these areas, it will follow the escalation paths outlined below.

Clear and distinct responses to the various types of issues, and the appropriate escalation path for each, are key to ensuring any issues or problems brought to CAI's attention are resolved as quickly as possible and service to IDOA is not interrupted.

2.4.2.5 Please describe your Account Management methodology during implementation and transition and post-transition/implementation. Please include details such as meeting cadence, attendees, information provided during meetings, etc.

CAI has proven processes for implementing successful MSP programs, seamlessly transitioning programs from prior incumbents, and initiating new programs. CAI has used this experience to develop a customized implementation plan for IDOA which includes the transition from the current incumbent and details the role responsible for each task, a detailed listing of tasks with WBS structure for each week of the implementation, a detailed timeline, tasks for providing for technical tools and technical staff training, the rollout of the VMS, the strategy of transitioning existing resources, and tasks for ensuring data transfer is completed from the incumbent. The transition-in plan is part of our overall implementation plan for the engagement. Our plan includes one week of internal planning and validation with IDOA and then 10 weeks of implementation with IDOA. We have included the full plan in Appendix 11 CAI Project Implementation Plan and additional details in Section 2.4.11.1.

Our CAI Senior Account Manager, Implementation Manager, and members of our CWS team are assigned to the project to ensure proper oversight of the implementation and transition tasks. As detailed in Section 2.4.11.1, our Senior Account Manager and Implementation Manager will work closely with the IDOA to identify key stakeholders to include on our regular project status meetings, training sessions, and agency communications. We will validate with IDOA during this first week after our contract signing our formal Communication Plans to ensure we are communicating with the correct personnel assigned to this project. During our Week 1 and Week 2 Discovery period, we will also begin weekly meetings, as detailed in the Project Management sections of our project schedule to review the progress of the transition, discuss issues, and provide mitigation strategies for any challenges arising from the transition process. During this time, we will begin following our Communication, Issue Management, Change Management, and Quality Control plans developed for IDOA. After go-live, we will meet weekly with IDOA to continue to monitor the program for an extended period to ensure all issues or concerns are addressed.

Limitations on Provider Layering

Most providers have a W-2 or 1099 relationship with the resource, i.e., they are paying the resource and reporting wages to the IRS. In some cases, the provider may reach out to a third party to present a specific candidate. We limit this to one layer, i.e., the provider's vendor must have a W-2 or 1099 relationship with the candidate. Contract flow down provisions apply, including payroll verification requirements. Removing unnecessary layers of employment (and associated markups) is more cost effective for us and our clients, and helps to minimize issues that can arise with multiple layers.

Standard Contract Flow Down

During transition, we will develop flow down verbiage and other requirements that become part of the standard subcontract for participating in the MSP program. It will reference the final contract by name and number and call out specific points relevant to contingent staffing, including but not limited to requirements to perform all the following. We will confirm details during transition.

- Use E-Verify for all staff who accept a contingent staffing assignment
- Comply with all applicable Federal, state, and local laws
- Follow OSHA and other applicable regulations on physical safety
- Screening requirements as discussed in 2.4.3.9, below

Vendor Management Portal

We maintain a separate portal that providers use to maintain their documentation and certifications, such as signed Subcontractor Agreements, W-9 information, etc. This may also include contract amendments, in cases where the state client has issued an amendment to the master contract. We track any compliance information that is dated, then the portal generates automated alerts for items approaching expiration. Notifications occur 30 days prior to expiration, seven days prior to expiration, and upon expiration. This is a quality control (QC) step that enables all parties to remain current in maintaining information on file.

Our providers find the single portal a convenience not only as a repository but also as a means of expanding their business from one MSP program to another. The portal also ensures complete transparency to providers – they are able to see the status of all of their documentation on file with CAI, meaning that there are no “surprises” and providers are able to take ownership of ensuring their ongoing compliance with the requirements of the contract.

Differentiating the inclusion process for providers who wish to participate in the IT Consulting and IV&V networks is an increased emphasis on provider capability and qualifications, due to the unique requirements associated with each type of work. In each instance we ask the provider to share with us their experience and capabilities, which are requested in the form of an enrollment packet providing verifiable delivered work and references, as well as general information. Upon receipt of this packet, CAI conducts a review of the provider as a whole, looking at how they have delivered this work, timeliness, and budget management.

This is important for IT Consulting and IV&V providers as it shows they can manage time and cost, based on a client's requirements. We look at how they have developed their responses and how they have staffed a response. This level of detail shows they can understand requirements and create a solution to respond to those requirements. Once we have gathered the information on a provider, we will then gather references, and if appropriate make a recommendation to IDOA that the provider should be included in the network. We will provide appropriate supporting information for each provider when needed.

For the SEAL program, CAI will ensure they are registered within the SEAL program, and that ideally, they have a history working under the program so that the provider is not establishing new working relationships and building their program as they onboard. We would like our SEAL providers to hit the

ground running. Although the minimum requirement is for at least one SEAL provider in the network, CAI will add further providers during open enrollment to ensure that we help meet the Governor's NextLevel Agenda and the missions of the Indiana Office of Work-Based Learning and Apprenticeship.

2.4.3.5 Please describe how you and your providers will actively recruit resources on behalf of the State. Please ensure your response identifies similarities and differences in your practices across Staff Augmentation work categories, SEAL, IT Consulting Services, and IV&V of State Project Work.

CAI and its network of providers will each have a slightly different approach to recruiting resources. CAI does not dictate the recruiting practices of its provider network, apart from ensuring it is performed according to contract requirements. Each provider within the network will be governed by certain requirements to be met according to the Subcontractor Agreement that contains flow down terms from the final agreed upon contract. Our VMS system ensures that all critical recruiting checkpoints are completed and candidates are thoroughly vetted.

Our MSP programs offer considerable capability and depth from which we can pull to support IDOA. As of April 2021, the CWS practice has more than 13,700 active candidates either engaged, interviewing, or part of the candidate pool that constitutes our practice.

CAI's Recruiting Approach

CAI's approach to recruiting has been built into a tried and tested program. Our team has a well-established recruiting process coordinated by seasoned recruiters. We find that ensuring resource availability requires both an established process that maintains a ready portfolio of candidates as well as making certain that the candidates truly fit the needs of our clients. We maintain an extensive pipeline of IT resources and a developing pipeline of clerical and medical resources too. We will continue to build our recruiting capabilities as needed so that we can respond quickly to IDOA requisitions. Building this pipeline includes several steps, all managed through a well-established integrated recruiting system that coordinates our many resources within a common workflow.

The key to our approach is to plan and be proactive. As described in the accompanying diagram, CAI will work with IDOA to understand short-, medium-, and long-term recruiting needs and develop a pipeline of qualified candidates who have the right skills, availability, and have completed initial screenings, interviews, and background checks as appropriate.

The recruiters also assess the candidate's social skills, telephone manner, and professionalism. If there is a good potential match, the recruiter obtains a current resume and invites the candidate for a personal interview with a technical manager capable of assessing the quality of the candidate's answers to technical questions. If there continues to be interest on the part of both CAI and the candidate, technical candidates take an online skills test to confirm that they can perform at the level required by the placement.

We will perform technical interviews when required by the requisition and/or Hiring Manager. We use subject matter experts (SMEs) from various CAI technical teams across our organization. We will question around the specifics of the role presented by the Hiring Manager, ask any technical questions needed, and drill into details with the candidate. We may ask the candidate to present experience or respond to scenarios so that we can fully understand their capability and limitations. We document the results of the screenings and provide detailed feedback to the Hiring Manager on completion.

On the same day as the technical interview, the recruiter meets with the candidate, further describes the position, and obtains the necessary permissions from the candidate to complete the required background checks. CAI always checks educational and employment history, including references, as well as proof of citizenship or valid work permit. We also conduct additional pre-screening checks based on client requirements, such as criminal and financial history checks, and drug testing.

CAI will recruit for IT roles based on the identified process. Should CAI fill clerical and medical positions, we will follow the same process but without screening interviews as required. CAI would ensure that candidates for clerical and medical roles have all the necessary skills, certifications, education experience, and other mandatory needs, and then submit the resume via VectorVMS® to the Hiring Manager. The difference in screening activities for IT, clerical, and medical is the only significant change across CAI's recruiting process when hiring to place directly under the program.

Recruiting for SEAL, IT Consulting, and IV&V work will follow a similar approach, ensuring the best possible candidates are selected for the project work. There will be slight differences in the types of interviews and the timing of background screenings.

- 2.4.3.6 Please describe how and how often new providers are added to your network. Please include any Provider Network Agreement, including but not limited to Non-Compete Agreement, between the MSP and the provider. Please ensure your response identifies similarities and differences in your practices across Staff Augmentation work categories, SEAL, IT Consulting Services, and IV&V of IT Project Work.

CAI will establish and maintain a network of enrolled providers that can support IDOA throughout the contract period. CAI currently has a provider network of over 2,250 companies across the United States; with the transition of current providers to a new CAI program, IDOA will have access to one of the largest provider networks available. Our experience has provided key lessons learned on how to efficiently onboard our providers in a new engagement.

We will:

- Work with providers who have engaged resources under the current contract – many of which are likely already working with CAI in other MSP programs – to enroll them in our new program
- Use a streamlined enrollment process via an online portal, designed to allow providers to fulfill basic contract enrollment/compliance requirements as quickly as possible, while also being able to see the status of their enrollment in real time, consistently kept up-to-date on enrollment status
- Provide an open network which allows any interested provider to enroll at any time, and engage niche providers to support emerging technologies

within the required period and following additional requests, may be removed from the network due to noncompliance, with IDOA approval.

Component	Description
IRS W-9	Contains the firm's place of business and Federal Employer Identity Number (FEIN)
Certificate of Insurance	Must be currently valid and effective for at least six months into the future; we require new certificates upon expiration
Workers Compensation Insurance	Standard workers compensation insurance in compliance with State law. Additional requirements would be included in the subcontract agreement with providers for compliance.
Marketing Material	Documentation or other evidence that the firm exists as an entity, effectively preventing 1099 individuals from falsely representing themselves as a firm. We accept any of the following: functioning website, image of the firm's telephone listing from the public phone book, published brochure describing the firm and its services, or a published write-up of the firm and its offerings.
Subcontractor Agreement	An executed agreement must be submitted to complete registration in the Indiana Provider Network
M/WBE Certification (optional)	If the firm is certified as an M/WBE through the State of Indiana, they may provide proof of certification to take advantage of tiering benefits aimed at increasing M/WBE participation
SEAL (optional)	Proof of registration and certification within the SEAL program
Buy Indiana (optional)	Proof of registration with Buy Indiana as listed on the Buy Indiana website

While each potential provider is required to provide the appropriate information noted in the above table, the IT Consulting and IV&V providers will need to provide further information in regard to any company wide certifications they hold which are relevant to the requirements. Examples may include ISO (International Organization for Standardization) certifications, partner or product certifications to be able to respond to the statement of work, and quality assurance certifications. While these provide a brief example, as part of the requirements gathering on each provider CAI will ask for current certifications and request that those certifications remain current throughout the contract period. The provider will provide annual proof of certification or qualification.

- 2.4.3.8 Please describe why and how often providers are terminated and removed from your network. Please ensure your response identifies similarities and differences in your practices across Staff Augmentation work categories, SEAL, IT Consulting Services, and IV&V of IT Project Work.

CAI has well established processes for tracking and measuring performance of both our staff augmentation and IT Consulting and IV&V provider networks, and how, when necessary, we decide to terminate their participation in the program. While we discuss below how we measure performance of each provider, the tone needs to be set that CAI's first and most consistent driver is to make sure that we

provide the support and resources needed to each provider so that they can succeed. A program with limited support and high rates of attrition does not encourage participation from the provider community, so CAI's goal is to establish clear engagement parameters for joining the network and then work closely with each provider to help them succeed.

However, there are times when a provider may need to be removed from the network for performance or ethical issues. The common reasons a provider may be terminated or removed from the program include the following:

- Failure to pay resources on time
- Consistent failure to respond to resource requests
- Failure to meet Subcontractor Agreement terms and conditions, including maintaining required contract documentation
- Attempts to directly engage with the client or circumvent the program
- Repeated instances of submitting resumes and candidates without authority (Right to Represent)
- Insolvency or other business issues

As mentioned, CAI's approach is to be proactive to minimize the above risks. We have clear performance expectations that are set out prior to engagement with a provider so they understand the expectations placed upon them to deliver.

Performance for Staff Augmentation providers and SEAL providers will be measured through business intelligence reports generated by VectorVMS® as they provide similar services and can be measured through similar toolsets. Among the metrics that are constantly monitored are the number of candidates submitted by the provider, the number of candidates forwarded to the agency, the number of candidates selected for interview, and the number of candidates hired. Submittal numbers determine whether providers are actively participating in the network, but this metric cannot be used by itself to measure the quality of a provider, so it is supported by reviewing the ratios of candidates submitted vs. candidates forwarded and candidates interviewed vs. candidates hired. The combination of these data points clearly indicates a firm's ability to match candidates with job descriptions and the quality of their recruiting and screening processes. In addition, 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 IDOA opportunities but also offer CAI insights into current market trends – for example, if candidates are interviewing for and receiving multiple offers.

An example of this type of report is the Vendor Scorecard, which monitors a specific provider's performance. The scorecard highlights specific points of performance – both positive and negative – and enables the provider 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 providers to discuss their performance, as it provides detailed insight into the where a provider is performing well or may be struggling. An example of a Vendor Scorecard appears below.

providers to be added with approval from IDOA and IOT, CAI will likewise place final termination decision in their hands as well.

- 2.4.3.9 Please describe how you will ensure that the State's requirements on prescreening (e.g. background/reference checks, drug testing, security clearances, and criminal history checks) are properly carried out by Respondent or providers. Please provide a list of all prescreening service companies Respondent plans to use during the term of the contract. Please ensure your response identifies similarities and differences in your practices across Staff Augmentation work categories, SEAL, IT Consulting Services, and IV&V of IT Project Work.

CAI has a comprehensive screening process that is thorough and complete. It is tied to experience and lessons learned from our MSP programs and to our staff augmentation portfolio within the business. The prescreening is further enhanced by incorporating additional or differing requirements of the client, IDOA. At a minimum, regardless of CAI's own processes we will meet those requirements defined by IDOA at conclusion of contractual agreements and defined by the RFP. Our methodology for provider resources and CAI employees is discussed further below.

Provider Resource Screening Requirements

To ensure consistency in the process, CAI will flow down the mandatory screening requirement criteria to our providers across all work categories for Staff Augmentation, SEAL, IT Consulting, and IV&V. They will be incorporated into the Subcontractor Agreement. CAI will measure compliance of these items through tracking completion of screening items within VectorVMS®, where failure to complete screening tasks will be identified easily. Should the provider face challenges in meeting or understanding the requirements, we will work with the provider to train and resolve the issues, before making any further recommendations.

Background Checks

The accompanying table summarizes our standard background checks flowed down to the MSP network providers. We can expand background checks as needed for IDOA and for the individual Hiring Manager. Our goal is to be as flexible as possible for IDOA and its Hiring Managers.

As background checks are a provider requirement and a term flowed down within the Subcontractor Agreement, providers are responsible for engaging the pre-screening service companies best suited for their needs. Once the provider has completed the background check, in a manner appropriate to them, they enter the results of the check into the VMS system. This task is monitored and on completion a notice is sent to the Account Manager for review.

Screening	Description
e-Verify	Uses a U.S. Department of Homeland Security (DHS) interface to confirm eligibility to work in the U.S.
Social Security Number (SSN) Trace	Identifies names and addresses associated with a particular SSN
National Criminal Screening	Utilizes the FBI's National Instant Criminal Background Check System (NICS) and the National Sex Offender Public Website (NSOPW) to identify malfeasance
National Sex Offender Registry Search	Utilizes the FBI's NSOPW to identify malfeasance

the appropriate network. In these one-off instances, CAI can either onboard them at that point in time or if appropriate onboard them at the next enrollment window for their particular category(s) depending on IDOA preference.

Our response to 2.4.3.6 explains our approach to onboarding for each service, describing and similarities and differences, the same will apply here too; the provider will need to meet those mandatory requirements and provide the requested information to be included in the provider network.

2.4.3.13 Please describe current policies and procedures you have in place to protect the State from co-employment risk.

We understand the industry-wide issues associated with co-employment. Through our experience with many staff augmentation contracts, we have developed standards to clearly delineates contracted resources (associates) from employees of our clients.

The Subcontractor Agreement and MSP onboarding documentation states that resources are not employees of the MSP (unless a resource is under the Selected Resource Program) or the client. The MSP model enables employers – the providers - to manage their own employment agreements. The VMS provides visibility into tenure and effectively enables tenure reporting. In those instances where tenure limits are enforced, the VMS can assist our clients with tracking any tenure rules they have in place. A tenure report will help track number of hours worked so that co-employment risks can be mitigated.

There are further tasks that we perform to minimize co-employment issues. We will assign an Account Manager to IDOA and by ensuring that all CAI associates understand that their first point of contact for employment-related guidance is the Account Manager for SRP resources or to their provider if they are a subcontracted resource.

On their first day of employment, CAI employees in the SRP program and employees of the provider will receive and sign a process/procedure document that outlines the Account Manager's relationship with the resource so they understand that all discussions regarding compensation, benefits, leave, and professional/personal issues/concerns must be directed either to the CAI Account Manager or to the provider, respectively. This will become part of provider agreement language. Our current standard agreement varies slightly from client to client, but it requires the individual to acknowledge his/her status as an external employee, and not an employee of the State of Indiana.

The most important areas of concern are related to compensation and benefits. These are administered by CAI for staff under the SRP program or by the provider, and we strongly encourage the IDOA Hiring Manager to refrain from discussion related to them. In terms of vacation, certainly the engaged candidate will coordinate time off to ensure no impact on his/her work for the client, but this should be the limit of involvement.

In our experience, the primary risk to the client occurs when the client begins to treat the resource as an employee. On the one hand, CAI fully desires to create a collegial working environment, especially if the resource is working as part of a blended team of staff; on the other hand, it is important to retain a sense of reserve. In all cases, the client supervisor should refrain from involvement in discussing issues related to compensation, benefits, etc.

2.4.3.14 Please describe current policies and procedures to validate resource Employer of Record. How do these policies and procedures extend to 1099 resources?

CAI uses multiple methods for validating resource Employer of Record. We start by establishing a clear delineation between MSP, Provider and Contractor/Resource throughout the language we incorporate in

2.4.4 Selected Resource Program (SRP)

- 2.4.4.1 Please describe your payroll cycle for SRP resources. Please describe payment terms or situations where State payment of invoices for SRP resources would impact SRP resources' ability to be paid by Respondent.

CAI pays employees on a prescribed cadence throughout the year, 26 times. We are paid twice a month. Payment is typically around the beginning and middle of each month. Twice a year there are three payments made in one month. As CAI employees, SRP resources will be paid on the same cycle, and will not be affected by any payment terms of the State that we subsequently enter upon award.

- 2.4.4.2 Please describe employee benefit offering included in the Employee Benefit Costs (EBC) which may be reimbursed by the State. These benefits are limited to Health, Dental, and Vision Insurance, as well as Health Savings Account (HSA). Please provide an estimated per resource cost associated with the Employee Benefit Costs (EBC).

All full-time associates, averaging over 30 hours per week, and their legal dependents are eligible for CAI benefits. Eligible dependents are defined as:

- Legal Spouse or Legally Recognized Domestic Partnership (Notarized Affidavit Required)
- Dependent children under age 26, including stepchildren, foster children, legally adopted children, and children placed with you for adoption
- Dependent children over age 26 who are physically or mentally unable to care for themselves, with appropriate carrier certification

CAI's benefit package is designed to meet the needs of the individual employee and their circumstances. Coverage begins 30 days from date of employment. Open enrollment begins on January 1st of the following year. Termination is midnight on the last day of employment.

CAI offers a medical plan through Highmark Blue Shield. The plan allows for choice of provider and in- and out- of network benefits. A description of the benefits and the premiums appear in the accompanying image.

CAI calculates employee benefits costs based on salary, hiring terms, and benefits selections, resulting in a cost percentage multiplier. For example, for a salaried employee making \$50,000, cost for W2 benefits might be: $\$50,000 \times 1.3 = \$65,000$ resulting in a benefit cost of \$15,000.

2.4.4.4 Please describe your standard procedures and best practices related to employee placement and onboarding, resource management and support during the engagement, and State Hiring Manager support during the engagement.

CAI has developed best practices and standard procedures for onboarding staff, supporting the Hiring Managers, and providing appropriate management during the engagement. The following narrative addresses those items, from the State's position, the Hiring Manager's position, the selected resource's position, and CAI's ability to support each during the process.

Placement and Onboarding

To successfully place and onboard a selected resource, CAI follows an established best practice approach. Although the resource is a CAI employee and will onboard to CAI according to our practices and prerequisites, we are also conscious of the need for the selected resource to onboard with agency or department and any unique requirements that need to be met. With that in mind, CAI uses the VMS tool to handle the onboarding process, with the main difference being that instead of the provider completing the compliance tasks, it will be CAI completing them. As discussed below, part of the onboarding includes developing a detailed position description. Within that we will capture specific requirements and needs, which may also include the need to provide copies of certifications or membership registrations for example, as well as references, resumes, and other supporting artifacts. Once we have established what is needed, we add these requirements to Compliance Manager within the VMS. When we onboard the selected resource, they will provide those artifacts, CAI will acknowledge their provision in the VMS, and the Hiring Manager will then be able to review those artifacts and complete the onboarding with approvals.

CAI's internal onboarding is somewhat similar. We have a series of compliance items to complete as well, from proof of ability to work in the US, through to proof of education and certifications, necessary tasks for payroll, benefits, background checks and drug screenings, and insurances too. The completion of our own onboarding tasks will allow the resource to be entered in the SRP program with the State of Indiana as CAI's own employee.

The third task for consideration in onboarding is the contractual terms and payment terms for the selected resource. With an established program already in place, CAI will agree to final terms during negotiations for SRP resources. These terms and fees will be included in the final contract agreement and establish the payment and contractual terms for the base period of the agreement, and any option years. As appropriate, these terms may be addressed during option year negotiations.

Resource Management and Support

Throughout the engagement our Account Managers complete regular touch points with our employees to ensure the resource is performing well and happy with their role, to address any challenges, identify co-employment risks, gain feedback on the role and support provided by the client, as well as to manage the resource's long-term career plans. As a CAI employee the resource is entitled to the same career support as any other CAI employee. We see growth and development as intrinsic to CAI's success. CAI will address those goals with the employee and where appropriate with the Hiring Manager too, looking to develop the employee as a valuable resource to the State of Indiana. The resource will have access to CAI tools and support from within the enterprise as well. This might be additional training or access to an SME who has more knowledge to help the resource complete a task for example. The CAI Account Manager will be available at all times to support the resource.

Hiring Manager Support

Throughout the engagement the State Hiring Manager is fully supported for any resource engaged under the MSP program, whether that is a T&M resource, resources as part of an IT Consulting requirement, or a resource through the SRP program. In the instance of an SRP resource CAI will fully engage with the Hiring Manager to achieve a number of outcomes. These are strong customer satisfaction, a clearly identified description of the role the SRP resource will be fulfilling, establishing clear guidelines to manage co-employment risk, training and support for approving hours and timesheets, and defining the process for escalation.

Customer satisfaction is key. Although the resource has been identified by the State and hired by CAI at the State's direction, CAI still wants to ensure the Hiring Manager is satisfied with the hire and the resource is performing as expected. We engage regularly to make sure that is the case, and we provide customer satisfaction surveys through the VectorVMS® to capture feedback on the engagement.

A significant part of the process is building the position description and making sure the resource and role align. CAI will work with the Hiring Manager to establish the skills, role, duties, reporting structure, experience, and other items needed. The VMS tool will be the source of record to retain the position description. As the resource will be CAI's employee, we need to make sure the resource retains the correct skills and has the required certifications or has a path toward achieving those items. Supporting the Hiring Manager throughout the engagement and gaining a clear understanding as to how the progress of the work involved and what skills or experience the resource might need is an important task.

As discussed in 2.4.3.13, co-employment always remains a risk. The resource is a CAI employee. The resource will be clearly trained on understanding the distinctions involved and how to recognize any co-employment concerns. This support will also be available to the Hiring Manager. We can help guide the conversations so no risk is incurred as well as provide information and materials to help the Hiring Manager avoid the risk. The Hiring Manager will not be privy to resource pay and benefits information for example. The Hiring Manager will only provide direction regarding the specific job requirements and tasks as needed.

The Hiring Manager will be supported in the use of the VectorVMS® tool. This will be for timesheet approvals, changes to position description, compliance requirements, customer satisfaction surveys, and other means of interaction. Our Account Managers are fully conversant with the tool and will be available to support the Hiring Manager when needed.

A final support consideration is escalation. We hope that any challenges faced do not need to be escalated, but it is something we need to plan for. In this first instance, the CAI Account Manager is the point of escalation for the Hiring Manager. Any issues related to the provision of services start here, from problems with the VMS, payment, or challenges with the resource. We have been supporting MSP programs since 2004 and have been using the proposed VMS tool since then as well. We are highly experienced in handling any escalation issues, knowing when to escalate further or how to resolve in the moment. This capability will be always available to the Hiring Manager. We want to resolve issues quickly and not put business continuity at risk.

2.4.4.5 Please describe how you will ensure that the State's requirements on prescreening (e.g. background/reference checks, drug testing, security clearances, and criminal history checks) are properly carried out by Respondent.

CAI has fully detailed our approach to meeting the State's screening requirements in 2.4.3.9, above.

The use of VectorVMS® Compliance Manager along with CAI's contract management oversight means that agency- or contractually required items are complete and maintained before and over the course of an

assignment. This process, applicable to all staffing requisitions, provides the assurances needed that we have completed a thorough screening.

Additionally, to ensure screenings are properly carried out and to place the onus firmly on CAI to do so, the screening requirements will form a contractual term to be met. In the same way we flow this requirement to our providers, the same requirement, proof of completion, and responsibility should the requirements not be met will be placed on CAI contractually. This ensures tasks are met and more importantly, we are maintaining the integrity behind our position of managing SRP resources rather than abusing our position as the prime Contractor.

2.4.4.6 Please describe current policies and procedures you have in place to protect the State from co-employment risk with SRP resources.

In the case of SRP resources, CAI has clearer control over the resource to minimize co-employment risks. The resource takes task direction from the agency however all personnel issues and payment issues will be conducted between CAI and the resource. As we discussed in 2.4.4.1, CAI pays the resource according to the CAI payment cycle, regardless of any payment cycle agreed upon between CAI and the State of Indiana. This removes a significant risk of co-employment as we are not dependent on the State to make payments so that we can pay the resource. The resource is paid regardless as they are our employee.

The following narrative, also used in response to 2.4.3.13, further delineates the risk areas and our approach to co-employment mitigation.

We understand the industry-wide issues associated with co-employment. Through our experience with many staff augmentation contracts, we have worked with several models to clearly delineate contracted resources from employees of our clients.

We assign an Account Manager to IDOA and ensure that all CAI employees understand that their first point of contact for employment-related guidance is their Account Manager.

On their first day of employment, CAI employees in the SRP program receive and sign a process/procedure document that outlines the Account Manager's relationship with the resource so they understand that all discussions regarding compensation, benefits, leave, and professional/personal issues/concerns must be directed either to the CAI Account Manager. This will become part of Subcontractor Agreement language. Our current standard agreement varies slightly from client to client, but it requires the individual to acknowledge his/her status as an external employee, and not an employee of the State of Indiana.

The most important areas of concern are related to compensation and benefits. These are administered by CAI for staff under the SRP program, and we strongly encourage the IDOA Hiring Manager to refrain from discussion related to them. In terms of vacation, certainly the engaged candidate will coordinate time off to ensure no impact on his/her work for the client, but this should be the limit of involvement.

In our experience, the primary risk to the client occurs when the client begins to treat the resource as an employee. On the one hand, CAI fully desires to create a collegial working environment, especially if the resource is working as part of a blended team of staff; on the other hand, it is important to retain a sense of reserve. In all cases, the client supervisor should refrain from involvement in discussing issues related to compensation, benefits, etc.

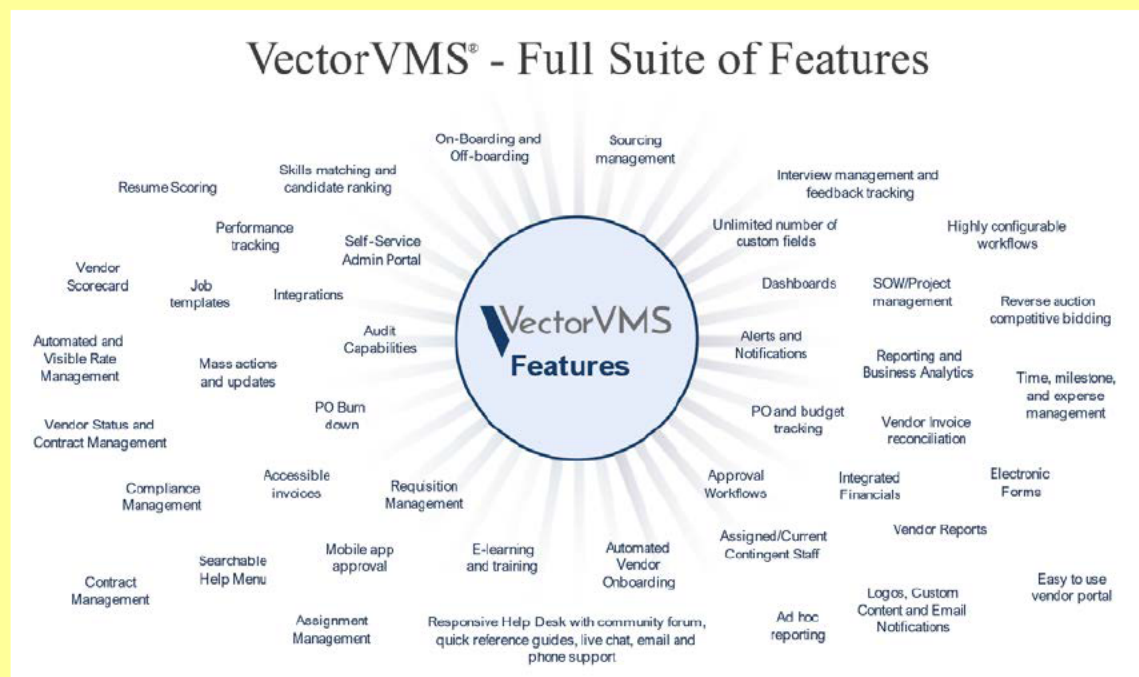
2.4.4.7 Please describe current policies and procedures to validate resource Employer of Record. How do these policies and procedures extend to 1099 resources?

2.4.5 Vendor Management System (VMS) Requirements & State End-User Experience

2.4.5.1 Please describe how your proposed solution meets the minimum functionality of the VMS as outlined in Section 1.4.6 of the RFP.

We are presenting a highly integrated MSP management solution driven by a hosted VMS application, VectorVMS®. It is a verified ecommerce system that facilitates instant communication between stakeholders and serves as a common repository for information related to engagements created through the MSP program. We currently use VectorVMS®, previously known as PeopleFluent, in our MSP programs including our references, the Commonwealth of Virginia, State of New Jersey, and State of North Carolina. As well, unlike competitors in this space, the VectorVMS® application is Section 508 compliant to WCAG 2.0 AA standards.

The State of Indiana 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 State to provide approval of resource hours, reimbursable expenses, and deliverables (if applicable) prior to invoice submission. Our chosen VMS system, VectorVMS®, is a robust system which automates the resource and project engagement process for IDOA. A full list of features is illustrated in the diagram below.



Online Processes

The core VMS component triggers electronic notifications to impacted stakeholders based on business rules. For example, when a State customer releases a staffing request through our electronic requisition process, the VMS notifies multiple CAI representatives, and can be configured to also alert other State, stakeholder, or agency 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.

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. State customers 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.

Proposal Review and Ranking

Our VMS system has the ability to provide IDOA with ranking abilities when subcontractors submit proposals for project work. The hiring manager may review and score each proposal within the system as defined during our initial transition and configuration of our VMS application.

Invoice Submission and Tracking

Time is recorded in the VMS and approved by the associated 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.

Reporting

We will provide a quarterly report to the State within 15 business days of the quarter's end. The content of the report will 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.

CAI has provided an example of a quarterly report presented to a current client at Appendix 8 VectorVMS® Standard Reports. These reports, based on existing client data, clearly show the reporting capabilities CAI and the VectorVMS® can offer. We will produce accurate and substantive information that describes the value of the State of Indiana program and includes active network providers, pending network providers, inactive network providers, business trends, MWBE and IVOSB set aside and participation, contract utilization by agency and job category, and market rates and contract hourly reviews. We will also review SLA performance, where we have exceeded expectations and how we might improve indicators should trends be identified.

Purchase Order/Resource/Project Tracking

CAI measures provider performance on a T&M SOW through a series of reports via the VMS Business Intelligence Platform. The specific reporting will depend on how IDOA 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.

The use of the VMS reporting allows us to proactively monitor provider performance as the project progresses. It also provides our SOW Project Managers the necessary tools for our ongoing project oversight of SOW engagements so that we can quickly intervene if a performance issue is identified.

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 review.

Single Sign On

As part of the discovery activities, we gather the report types required and build those reports into the VMS as scheduled, standard reports. The requirement for contract utilization is also one such report we will include with the initial reporting tasks. This is a common report, produced across many of our existing programs.

Overview By Manager - State of Georgia					
Refreshed: Monday, February 1, 2021 11:23:18 AM					
Data for Time Period: 3/1/2019 12:00:00 AM - 12/31/2020 11:59:59 PM					
Manager		Agency	Overall Spend		
			Total Engmts	Total NEW Engmts	Avg Bill Rate
(all managers)		Agency	1,269	1,269	\$100,415,017 \$66.82
Abbott, Scott		GDOT - IT IFRA	2	2	\$102,772 \$41.22
Abusaid, Mansour		KSU - UITS	2	2	\$34,760 \$22.00
Adams, Latanya		Dekalb - IT	2	2	\$56,372 \$25.37
Adcock, David		Georgia Tech - ERP	1	1	\$334,665 \$155.03
Adcock, David		Georgia Tech - OIT	1	1	\$182,355 \$126.90
Ahmed, Samir		GPSC	1	1	\$29,645 \$148.04
Ainsley, Astrid		DPH	1	1	\$8,975 \$65.99
Alford, Will		GTA - Portal/DSGa	2	2	\$178,353 \$63.40
Allen, Bobby		SBWC	2	2	\$44,832 \$80.92
Allen, Karen		DOR - IT	6	6	\$1,109,755 \$83.58
Allen, Travis		DOE/TS	24	24	\$2,529,355 \$72.90
Allison, Courtney		KSU - UITS	3	3	\$266,675 \$83.60
Arumugani, Udhya		DOE/TS/LDS	9	9	\$1,350,799 \$67.29
Arumugani, Udhya		DOE/TS/SPED	4	4	\$345,600 \$75.00

Document: Georgia Management Reports
Refreshed By: x1013\$CAIXORG1

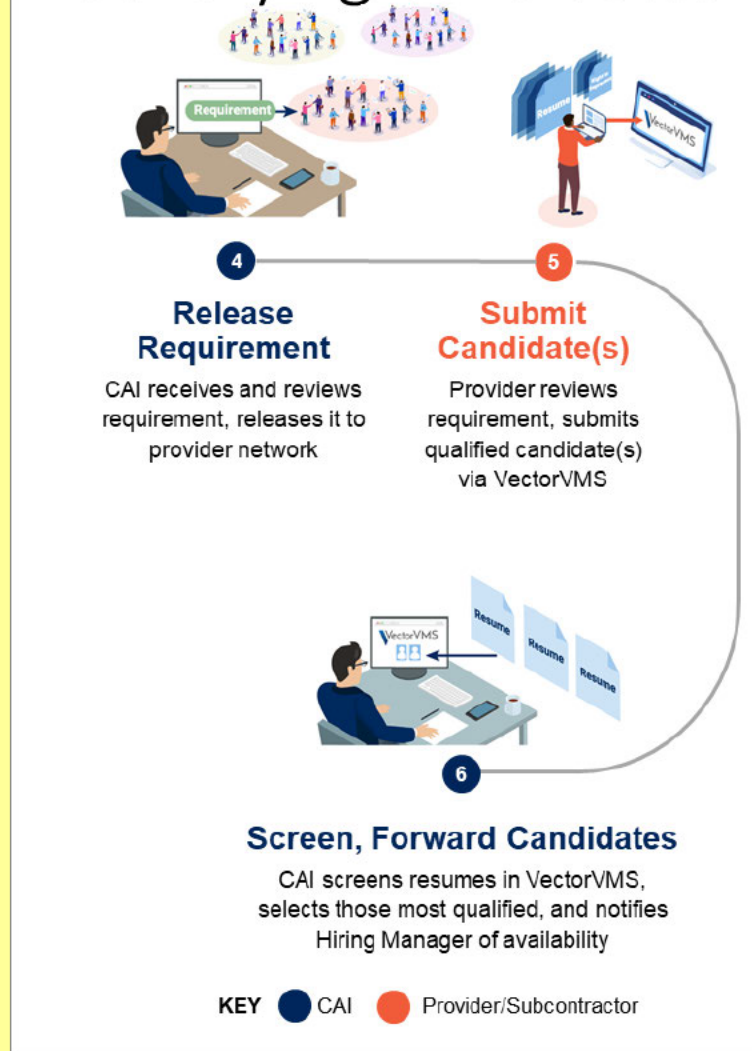
Page: 1 of 16

Sample VectorVMS® standard and custom reports appear in Appendices 8 and 9, respectively.

- 2.4.5.3 Please describe the potential for your solution to integrate with PeopleSoft. Please describe the MSP business process and highlight PeopleSoft integration points. Please also include prior PeopleSoft integration experience with other clients, if any.

The VectorVMS® platform is easy to use, configurable, and integrates with any other platform (ERP, HRIS, CRM, ATS, etc) including PeopleSoft, which is a long-term integrations partner. VMS has standard bi-directional integrations with PeopleSoft Financials and candidate and engagement data integrations with PeopleSoft's HRIS system. VectorVMS® has integrated the system with PeopleSoft in approximately eight programs.

Identifying Candidates



4. Release Requirement

CAI receives and reviews requirements, releases it to provider network

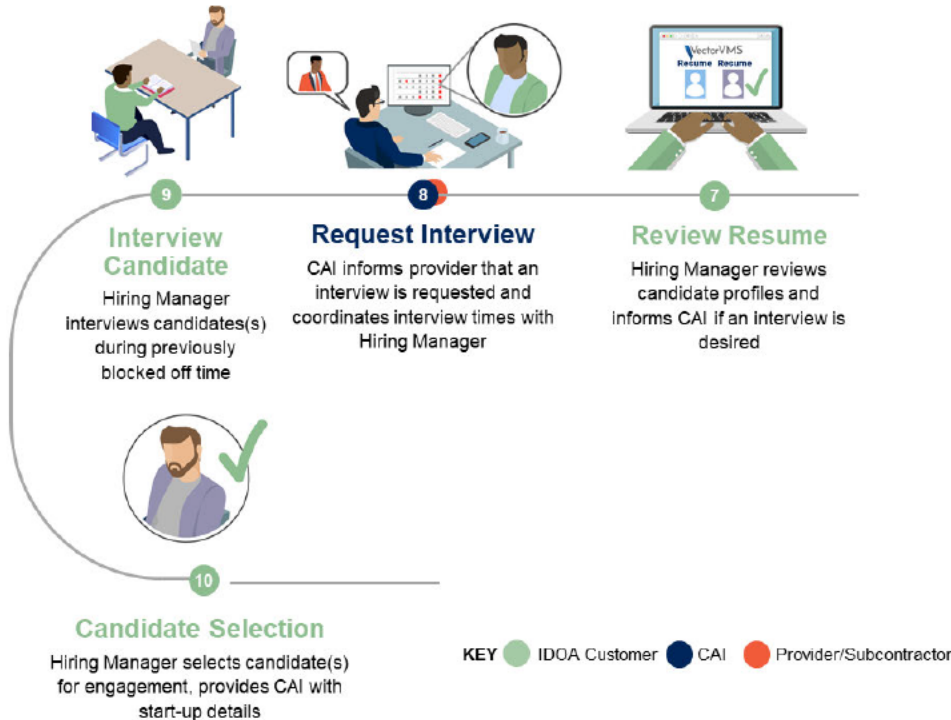
When the IDOA customer completes the requisition, the VMS notifies CAI. We will review it immediately. If we identify ambiguity, we may confer with the Hiring Manager for clarification. In most cases, we release it to the provider/subcontractor network within hours of receipt. The requisition goes to the entire community of enrolled providers, based on the work location and type of labor.

5. Submit Candidates

Provider reviews requirements, submits qualified candidate(s) via VectorVMS®.

Providers are responsible for evaluating their workforce, determining availability for the specific position, and providing candidate details in the VMS. The software guides the provider in uploading the information, including responding to the specific requirements of the requisition. We also require providers to use identical templates when creating resumes. This enables reviewers, including the IDOA

Selecting Best Candidate



7. Review Resume

Hiring Manager reviews candidate profiles, informs CAI if an interview is desired

CAI provides candidates based on the contract and requisition. For most positions, this entails providing between three and five candidates for a position, described above. The Hiring Manager can review the information online via web browser or mobile phone. VectorVMS® also provides a set of screens allowing side-by-side comparison of multiple candidates, which provides a high-level summary of how candidates compare in multiple criteria, such as skillsets, pay rate, etc.

Customers occasionally enter requisitions for multiple positions. In this scenario, we will forward more than the standard number of candidates based on the circumstances of that particular requisition. VMSVector has a “Deployable Rating” function to allow managers to rank candidates on a scale of 1 (worst) to 10 (best). For reviewing a very large number of candidates, we encourage the Hiring Manager to use it to score candidates based on their expert judgment and use this as a means of filtering candidates based on the subjective ranking. They can then easily see candidates that they have scored at a certain level.

After reviewing the candidate profiles, the IDOA Hiring Manager selects one or more candidates for interviews. As noted earlier, these can be via telephone, video, web-based or in person. Customers may wish to conduct an interview at the agency location, such as when they wish to discuss specific equipment or machinery. The IDOA Hiring Manager can indicate logistics for the interview(s) within VectorVMS®. As noted earlier, the IDOA Hiring Manager should block off time slots for interviews when creating the requisition.

National Criminal Screening	Uses the FBI's National Instant Criminal Background Check System (NICS) and the National Sex Offender Public Website (NSOPW) to identify malfeasance. NICS in turn incorporates criminal history data not only from the Florida Department of Law Enforcement but also similar agencies across the U.S. We understand the IDOA requirement for a seven-year history.
National Sex Offender Registry Search	Uses the FBI's NSOPW to identify malfeasance. We understand the IDOA requirement for a seven-year history.
County Screening	Uses county-specific criminal screening, based on the SSN Trace. We understand the IDOA requirement for a seven-year history.
Credit Employment Report	As allowed by Federal law, this uses a modified version of a standard credit report to identify employment history.
Drug Screening	Identifies drugs present in the candidate's body. The 5-panel test follows the Federal government's <i>Mandatory Guidelines for Workplace Drug Testing</i> and identifies presence of marijuana, cocaine, opiates, amphetamines, and Phencyclidine (also known as angel dust). Some IDOA customers may require this for specific positions, such as those at a State hospital, school, or correctional facility.

Tax Liability Check

We acknowledge the IDOA requirement for a Department of Revenue tax liability check, if applicable, subject to the DOR policies regarding such checks.

Fingerprinting











We understand that some positions may require fingerprinting, as determined by the Hiring Agency and Manager, such as positions with access to Personally Identifiable Information (PII).

TB Shot

We acknowledge that assignments located at a State hospital, school, or correctional facility may require a TB shot to be updated annually. In the event that this is not performed by the applicable facility, CAI or the provider will be responsible for such test.

Additional Certification(s)

Much like the items listed previously, we will use the Compliance Manager function within the VMS to control this. The accompanying image is part of the "Candidate Compliance" tab, showing required and optional documents, credentials, and other certifications. Some items may be required for all candidates, such as the criminal background check. Others will be specific to the position. For example, the Nurse Practitioner position requires the necessary Drug Enforcement Administration (DEA) and Controlled

Item	Due
 Onboarding Items 	
Criminal Background Check	 Before Engagement
Education Records	 Before Engagement
Professional Credentials	 Optional
Personal References	 Optional
Military Record	 Optional
Credit Reports	 Optional
Social Security Traces	 Optional
District Non-Disclosure Agreement	 Before Engagement

Substance Registration (CSR) specific to the State of Indiana, and the Attorney position requires the Indiana Bar Association license in good standing.

We will work with IDOA customers to confirm the specific certifications required. We will review the certifications as part of reviewing the candidate and confirm they are currently valid, i.e., prior to releasing the candidate for review by the IDOA customer.

We also use the Compliance Manager function to enforce recertifications as needed. For dated requirements, the VMS automatically generates alerts to remind the provider about expiring certifications and ensure they are completed in a timely fashion. This occurs at no expense to the IDOA customer.

2.4.7.4 Please describe how you will work with the State in order to provide a resource for a position that may be difficult to fill (e.g. rural regions of the State or positions that have extensive prerequisites).

We are proactive in supporting our MSP clients, and this is a critical success factor in responding to unusual or challenging requisitions. The narrative below describes multiple factors that enable us to respond quickly to unusual circumstances, including surge assignments.

- Clear job descriptions
As discussed above, we work closely with our customers to ensure that the final requisition clearly defines the position and appropriately delineates required versus desired skillsets. This enables our providers in turn to respond to the specifics of the engagement.
- Large provider community
Our statewide MSP contracts have an average of 369 providers. Having access to a large provider community means there is no single point of failure in fulfilling temporary staffing requests. This is especially important for surge requirements for a large number of temporary staff. In addition, some of our providers are highly specialized in terms of the job categories they can fill. In some cases, we encourage providers for one state to consider enrolling in another state's MSP program. This enables CAI to leverage the much broader community of providers from multiple states.
- Curated provider community
The IDOA MSP incorporates 118 discrete job titles and 19 optional additional positions. In enrolling in the network, providers indicate the positions they can fill and the geographies they support. We may use this information to target specific providers or groups of providers. In unusual situations, we may request the provider community to support additional service areas. For example, firms primarily focused on South Bend may be able to respond to requisitions for staff in Bloomington.
- Sneak preview
In some cases, we may prepare our providers for upcoming requisitions to enable them to respond more quickly. This normally occurs during the time when the customer is preparing the requisition, just prior to release. For an unusual situation or hard-to-find skill, we may alert the providers of the upcoming request, with details TBD. The alert could be system-wide or to a targeted group of providers, depending on the circumstances. For example, a Department of Health (DOH) may be planning targeted rollout of vaccinations in specific counties, requiring short-term RNs, nursing assistances, or phlebotomists to administer the doses. We might alert medical staffing providers to prepare for the upcoming requisition, with details on counties and schedules to come with the formal requisition.

2.4.7.5 Please describe your process to address replacement coverage for absences or cancellations, including provisions in place to protect the State if/when this occurs.

Candidates are fully informed of customer requirements with regard to off-hours work (i.e. holidays and weekends) and we will provide service coverage as necessary to meet all IDOA needs. Should coverage be necessary during off hours, employees will be scheduled to work those hours and compensatory time off will be allotted according to the current policy.

All proposed substitutions of personnel will have qualifications at least equal to that of the resources initially proposed, evaluated, and accepted by IDOA. The resumes of the initially proposed personnel shall become the minimum requirement for qualifications for successor personnel for the duration of the total contract term.

If one or more of our resources will be unavailable for work for a continuous period, CAI will notify IDOA in advance to propose a replacement resource of equal or better qualifications in a timely manner.

All proposed substitutions of personnel for other than emergency situations will be submitted in writing, in advance of the proposed substitution, to IDOA with the information required above. IDOA must agree to the substitution in writing before such substitution shall become effective.

2.4.7.6 Please describe the process for removing a resource from a position upon request from a State manager.

CAI's number one concern is customer satisfaction. CAI strives to meet or exceed project requirements and resolve issues before they can cause disruption to the business of our clients. CAI's MSP Account Management team takes full responsibility for tracking performance and actual results. Contracted resource evaluations are performed at preset intervals to identify and address any concerns, in an attempt to set the engagement on the right path.

In the case of a performance issue, CAI has a comprehensive process for managing performance where the result is either remediation or termination. We work with our customer and human resources management upon identification of any performance-related issue. All customer satisfaction issues are handled immediately and swiftly. If termination is necessary, we communicate the termination to all involved parties, and follow through to ensure all client equipment is accounted for and returned, all timesheets are submitted and all other items are closed out. CAI maintains our guaranteed level of support while correcting any personnel issues.

2.4.7.7 Please describe the process after a matched resource does not have the required qualifications and certifications required by the State, including any consequences for the provider and reimbursement of costs to the State.

It is unlikely CAI would submit a candidate that did not have the State required qualifications and certifications. We use the VMS to manage and control the information about candidates, their skills and certifications, and all data needed to confirm their qualifications for the position. The VMS Compliance Manager tracks compliance requirements for each job requisition with the ability to alert both IDOA users and providers to missing or expiring documentation.

Compliance Manager is configured for enterprise-wide requirements and can be customized for specific position qualifications and certifications. The VMS will not allow the candidate to be engaged in the system until all required onboarding items have been completed. Compliance Manager provides over 45 different notifications that can be set to be automatically delivered to CAI, the Hiring Manager, and the provider which provide stakeholders with automatic updates when compliance items required for the engagement are due, have been completed, or are set to expire and must be renewed. The use of Compliance Manager along with CAI's contract management oversight means that agency- or contractually required items are complete and maintained before and over the course of an assignment.

This process, applicable to all staffing requisitions, provides the assurances needed that we have completed a thorough screening.

In the unlikely event the State determines the matched resource does not have the required qualifications and certifications required, we communicate the resource termination to all involved parties, and follow through to ensure all client equipment is accounted for and returned, all timesheets are submitted, and all other items are closed out. CAI's Account Manager will work with the Hiring Manager to provide additional candidates to replace the resource as quickly as possible. If the termination occurs within the first 10 days of the engagement, the State will not be charged for those hours worked.

Providers whose performance has repeatedly, after mentoring, been found unsatisfactory regarding candidate vetting and qualifications will be recommended for removal from the provider network.

2.4.7.8 Please describe your policies and standards associated with managing resources across providers. For example, how will you prevent or address situations where resources “jump” projects across departments or agencies? What is your policy on resources “shopping” providers against one another?

This is a common practice among organizations who do not manage the client/candidate interaction well. The reason often for the contracted resource to be ‘job shopping’ is that their engagement level with the provider is poor. CAI manages this process a number of different ways.

As part of our candidate selection process, we verify the Right to Represent (RTR) process is complete. Our experience with large MSP programs has demonstrated the need for clear RTR processes to ensure the candidates we submit are informed of their submission and understand the requirements of the potential role for which they are being considered. Candidates are required to provide signed documentation that they understand they are being submitted as a candidate to a particular client through CAI's MSP provider network and will be presented to the client only through CAI's program. The RTR verifies the submitting MSP provider has a relationship with the submitted candidate. We configure our VMS to include RTR as part of the submission process.

The VMS has controls in place for identifying instances where a contractor is trying to leave one engagement with one state agency, for another opportunity within the same program. In those instances, we flag the activity, determine if the contract is about to end, and if so, if the client plans to extend. If not, we can allow the new candidate submission to play out, coordinating transition from one project to the next as needed.

Additionally, when we see that a contracted resource who is working in one of our contracted states applies for a job in another state, we check with the current Account Manager responsible for the contracted personnel to make sure the current engagement is ending and that the contracted resource is not ‘job shopping’. If it is determined the resource is job shopping, the new submission under the other program is rejected.

If a contractor is trying to switch from one provider to another, but stay on the same project, we require written approval from the current provider stating they will allow the transition. If the current provider denies the request, it will not be permitted. If the current provider approves the change, we will alert the Hiring manager, and will facilitate the change.

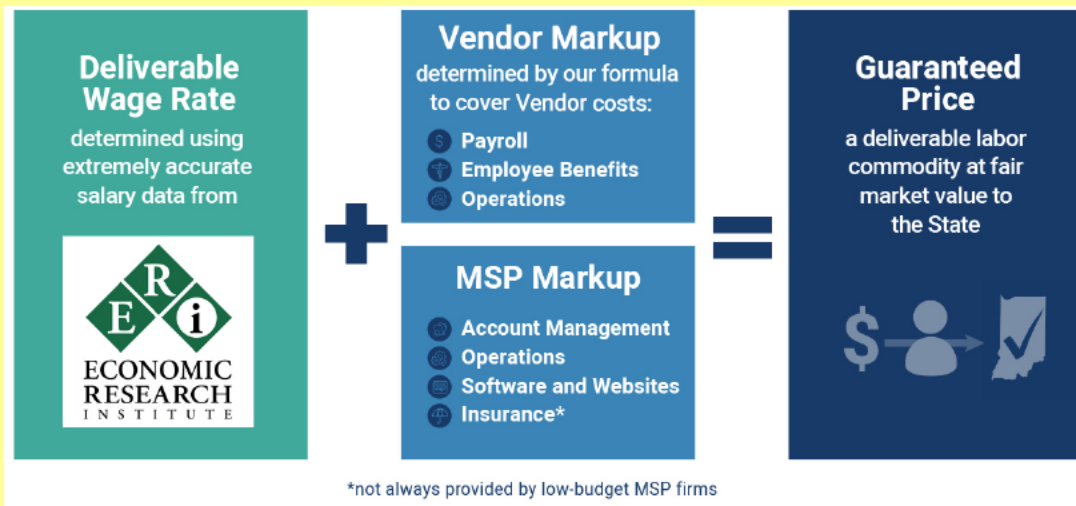
2.4.7.9 Please describe your communication process, the method used, and the frequency of status updates to end-users regarding the ability/inability to fill positions within the desired timeframe.

We are presenting a highly integrated VMS that facilitates instant communication between all stakeholders and serves as a common repository for all information related to temporary IT,

2.4.8 Job Descriptions, Rate Card, & Pay Rate Methodology

2.4.8.1 Please provide a detailed description of your process and methodology for establishing and/or validating position rates that are relevant to the market.

The largest component of IT labor is the wage/salary paid to the individual. CAI uses salary data from ERI (www.erieri.com) as a means of determining baseline costs. ERI is an independent research firm whose algorithms and data have been in use for the past 35 years; it does not offer consulting services, i.e., it has no self-directed incentive for modifying its metrics. Throughout our experience in multiple states, we have found the data to be extremely accurate for estimating salaries by position description and geographic location. The elements of our wage-based rate setting approach are shown below.



The ERI model allows for specific categories of wage data, appropriate for the multiple job categories and experience levels defined in this solicitation. It is updated quarterly which enables CAI to perform quarterly analysis of the rate card.

The salary requirement is the largest part of the rate make-up; the next largest pricing component is the markup that providers apply to base wages. The markup covers all costs and obligations that any employer must pay before calculating a profit. In developing a provider markup for the contract, we created a formula to cover their costs. For example, payroll costs, employee benefits to comply with ACA, and costs associated with doing business – like insurance coverage – were included.

ERI compiles exhaustive salary, cost-of-living, and executive compensation survey data – along with current market data, for more than 1,100 trade sectors. ERI data is derived from millions of data points gathered from digitized public records including the U.S. SEC; OCR of U.S. IRS returns; ERI Salary Survey's patented online surveys (78 U.S. industries in five countries); and licensed UK, Canadian, and U.S. salary surveys and datasets. It allows CAI to build wage data around a single or multiple job titles, across a narrow or wide geographic area, based on near real-time data. It factors events (such as the COVID-19 pandemic) into its quarterly data sets so that we can see trends and provide analysis to IDOA as the job market responds to that event.

We have used ERI to build market-driven rate cards for each of our MSP programs. It provides a consistent benchmark from which we can operate and has served as the underlying model for our MSP contracts for over 16 years.

2.4.8.2 Please describe how you will recommend updates to uniform titles, descriptions, and salary ranges and the information you will use to inform these recommendations.

CAI tracks and reviews job title usage on an ongoing basis, and formally reports on usage in our quarterly business reviews utilizing metrics from the VMS. During the quarterly business review, discussion centers around the use of the current rate card, potential job titles to be added, potential rate changes needed based on current ERI data, unused titles to be removed, a review of skill categories under which those job titles fall, and development of position descriptions as job titles evolve or sunset. The conversations and planning will cover all areas of staff augmentation, IT staffing, clerical/administrative, and medical.

Key to this approach being successful is information provided by Hiring Managers as well as stakeholders. To provide an effective rate card, CAI needs to understand an agency's plan for use of job titles. Additionally, CAI constantly monitors industry publications and attends events to stay ahead of trends. Knowing this, when tied with experiences across other state MSP programs, CAI can recommend new job titles, position descriptions associated with the job title, market rates based on existing data and data from sources like the Economic Research Institute (ERI), as well as proactively manage the expected demand with our provider network.

Our goal throughout the process is to be ahead of the curve, leading IDOA and its stakeholders, where possible, in the approach to being both current and forward planning with IT staff augmentation. We accept any changes will be implemented via a Contract Amendment.



CAI performs a quarterly review of rate data at a minimum. It may, at the State's direction, perform ad-hoc reviews, or may even drive the review itself if it notices trends in the market from which the State can benefit. CAI uses data from ERI (www.eri.gov) to review its data each quarter. When

preparing for our Quarterly Business Reviews, we refresh the rate card data upon which our rates are based to check for significant differences. This affords us the ability to work with IDOA to adjust rates, if necessary, or to add emerging job titles. New datasets are released quarterly, keeping the information fresh and relevant.

ERI is an established organization that gathers employer-reported compensation data and information from across the USA and worldwide. It shares this information to help simplify salary data analysis and compensation planning. Using the application, we can determine competitive salaries based on multiple criteria that are particular to our client such as location, experience, and skills. This allows us to establish a benchmark for our pricing that is a near real-time reflection of the market.

If it becomes apparent that a new job title is needed to accommodate an unforeseen set of requirements, we will use the same policy of matching the State's job description to the ERI descriptions to build a crosswalk. Depending on urgency, this activity can be performed immediately, or can be included for discussion and action in the Quarterly and Yearly Status reviews.

CAI will maintain a quarterly market analysis report that details local market rates and how they align with the rate card for the State and their location. This report will allow the State to evaluate the CAI rate card against the local market rates to see if adjustments need to be made to be reflective of current rates. Over time, this continual analysis helps predict market changes and allows the State to react based upon insightful information.

2.4.8.3 Please describe how and how frequently providers and resources are paid.

When CAI is paid by the customer, we release payment to the provider within a seven-day period. For example, if CAI receives payment from IDOA on July 1, payment would be made to the provider by July 8. CAI does have provisions for providers to select alternate terms. These are discussed in detail in 2.4.3.11.

Provider are required to pay contracted resources within 10 days of receiving payment. CAI payments to our employees, including SRP resources, engaged in IDOA work are paid semi-monthly.

this information and will alert the resource of the requirement to work additional time. The ideal approach is that the resource is part of the communication process so that it can be properly planned, and not a last-minute request.

OT Timesheet Report	
Virginia Hours Worked by Resource - Over 40 Only	
For 8/2/20 thru 8/8/20	
Candidate	TS Hours
Alluri, Praveen	41
Anand, FNU Deepa	47.5
Baird, Kimberly	43
Bellamkonda, Bavesb	45
Brewbaker, Rogers L	43
Christensen, Jolene J	43

The VMS includes an overtime reporting feature. This is run weekly and identifies all resources have worked more than the standard contracted hours, typically 40. This information is then reconciled with planned overtime and timesheets can be approved or rejected as appropriate.

2.4.8.6 Please describe how you will support the State in managing weekend, holiday, and overtime costs through reporting, data analysis, and recommendations for State consideration and implementation.

CAI has been managing multiple MSP programs since 2004, we are now in our 17th year and currently manage 10 distinct programs nationwide. During this time, we have gathered data that helps us to provide trend analysis and recommendations for maintaining business continuity during weekend, holiday, or typical out of hour's needs.

CAI starts with the Subcontractor Agreement. This identifies the overtime obligations with each provider. Some states pay overtime or pay at an increased rate, for others overtime is not allowed by provider resources, or the pay rate remains at the set hourly rate regardless of weekend or holiday period. The first step is to ensure this is clearly communicated and understood by all parties.

Secondly, trend analysis provides useful insight into how the state should react. If data shows that a flat rate is acceptable within the provider/resource community then the state can use this information to plan for the overtime expectations throughout any one year. However, as market forces changes and demand outstrips supply, the State will need to consider whether they should revise an established policy. Any policy around overtime should reflect the current market. If resources are being pulled away to a program that offers better benefits, rates, or overtime, the State needs to factor that information into any decisions they make. CAI and its providers want to provide the very best resources for the rates available, bringing the right blend of skills and experience together for a fair market rate.

Another area of consideration is the kind of labor required. CAI's experience with IT staff augmentation usually dictates a consistent rate regardless of when working, unless the client has a specified policy that requires an increase for holiday, weekends, or shifts. However, admin/clerical, and medical roles are subject to different market demands, and some of the roles are close to the minimum wage or at minimum wage limits. According to the Fair Labor Standards Act and the State of Indiana's own guidelines, most employees who are not exempt are entitles to overtime after 40 hours worked in any one 7-day period. Hourly employees who earn \$455 per week or less and work in non-exempt industry are eligible for overtime. Indiana has a minimum of \$10.88 for overtime based on minimum wage requirements.

CAI will gather information around the specific labor categories and identify those roles that are subject to overtime requirements. This information can then be used to create a cost analysis by the state so that it understands budgetary needs when required.

2.4.10 Customer Satisfaction

2.4.10.1 Please describe the methods used in collecting customer satisfaction data. Please describe the process and provide an example.

Customer satisfaction will be measured through surveys sent monthly and through specific questions relating to CAI performance. CAI surveys both Hiring Managers and our provider network for satisfaction with our services. For agency feedback regarding an engaged staff augmentation resource, CAI uses automated performance evaluations generated through the VMS. These evaluations are requested at the predetermined intervals and use a mixture of narrative responses and drop-down boxes to solicit feedback on any number of contracted resource performance areas, such as productivity, quality of work, technical capability, and overall performance. The evaluation criteria include:

- Resource/Client Relationship
- Resource's Productivity
- Resource's Quality of Work
- Resource's Technical Capability
- Resource's Overall Performance

The screenshot displays a web-based evaluation form. At the top, under 'Evaluation Rating', is a table with a 6-point scale from 0 to 5, with descriptions: 0 Not Applicable, 1 Unsatisfactory, 2 Poor, 3 Satisfactory, 4 Above Average, and 5 Outstanding. A callout box points to this table, stating: 'Each evaluation utilizes a scoring system (shown HERE) to gauge agency satisfaction with the resource. Like the rest of the evaluation, the descriptions for these ratings can be customized.' Below this is the 'Evaluation Criteria' section, which contains a table with 5 rows of criteria. At the bottom is the 'Evaluation Comments' section, which includes a table for 'Comment Label' and 'Vendor Viewable'.

Rating	Description
0	Not Applicable
1	Unsatisfactory
2	Poor
3	Satisfactory
4	Above Average
5	Outstanding

Each evaluation utilizes a scoring system (shown HERE) to gauge agency satisfaction with the resource.
Like the rest of the evaluation, the descriptions for these ratings can be customized.

Sequence	Criteria Name	Criteria Text
1	Candidate/Client Relationship	Attitude towards work and job, ability to work without direction, effectiveness when working with others, ability to communicate in an effective manner, professional appearance, professional personality.
2	Associate's productivity	Ability to finish assigned work on time, ability to work on multiple assignments, ability to plan and maintain workload.
3	Associate's quality of work	Accuracy of work completed, thorough at following through, effectiveness of work produced, quality of work when completed.
4	Associate's tech capability	Knowledge of requirements and standards, knowledge of required technical disciplines.
5	Associate overall performance	Overall performance.

Comment Label	Vendor Viewable
Final Comments	Yes

2.4.10.2 Please describe the methods used in measuring and reporting customer satisfaction to the State. Please describe the process and provide an example.

CAI surveys resource performance and customer satisfaction with our services as part of our MSP model. We compile the results of the surveys to indicate trends, identify issues, and measure our performance in several areas, including responsiveness of the Contract Management team, quality of our screening process, responsiveness and feedback to providers, and overall performance. We use these results to improve our services continually, making recommendations and improvements as

needed or through the quarterly review process. Our goal is to address issues before they arise, if possible – or at least within a timeframe that reduces risk if the customer feedback is negative.

CAI's standard schedule is to configure the VMS to send out surveys to Hiring Managers for feedback on resource performance 30 days after engagement start. We will then follow requirements for monthly surveys and reporting back aggregate data quarterly.

Results are captured through detailed reporting in the VMS and formally presented during our Quarterly Meetings or other required meetings.

2.4.10.3 Please describe your process for guaranteeing replacements for resources deemed to be "unacceptable."

In the unlikely event the resource fails to meet expectations due to lack of skills or capabilities necessary to complete the requirements of the role, CAI's Contract Manager and/or Account Manager will work with the Hiring Manager to provide additional candidates to replace the resource as quickly as possible.

The CAI Account Manager will consult with the Hiring Manager during the first 10 days to validate the candidate is satisfactory. If the resource does not meet performance expectations, we will terminate the resource and request new resumes from our provider network to begin the process of filling the position.

2.4.10.4 Please describe how the performance is documented and how providers are notified when unacceptable performance occurs.

Performance for staff augmentation providers is measured through BI reports generated by VectorVMS®. The Vendor Scorecard and Vendor Performance Dashboard measure performance on standard recruiting metrics: number of candidates submitted by the provider, number of candidates forwarded to the agency, number of candidates selected for interview, and number of candidates hired. Submittal numbers determine whether providers 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 IDOA opportunities but also offer CAI insights into current market trends – for example, if candidates are interviewing for and receiving multiple offers.

Vendor Scorecard

CAI uses the Vendor Scorecard to monitor a specific provider's performance. The scorecard highlights specific points of performance – both positive and negative – and enables the provider 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 providers to discuss their performance, as it provides detailed insight into where a provider is performing well or may be struggling.

Vendor Performance Dashboard

The Vendor Performance Dashboard reports on individual metrics across each provider firm actively enrolled in the network. CAI generates and posts the Performance Dashboard each quarter on our

1.7	▲ Weeks 8-10	24 days	Mon 11/29/21	Thu 12/30/21
1.7.1	Process Transition Job Requirements	3 days	Mon 11/29/21	Wed 12/1/21
1.7.2	▲ VectorVMS Training	10 days	Mon 11/29/21	Fri 12/10/21
1.7.2.1	▲ Indiana Agency Training Sessions	10 days	Mon 11/29/21	Fri 12/10/21
1.7.2.1.1	VMS Training Session 1	5 days	Mon 11/29/21	Fri 12/3/21
1.7.2.1.2	VMS Training Session 2	5 days	Mon 12/6/21	Fri 12/10/21
1.7.2.1.3	Training Sessions Complete	0 days	Fri 12/10/21	Fri 12/10/21
1.7.2.2	▲ Provider VMS Training Sessions	1 day	Mon 11/29/21	Mon 11/29/21
1.7.2.2.1	Online training is made available for Provider Training	1 day	Mon 11/29/21	Mon 11/29/21
1.7.3	▲ Production Ready	4 days	Mon 12/27/21	Thu 12/30/21
1.7.3.1	Send Login Notifications, Distribute Training materials and User Guide	1 day	Mon 12/27/21	Mon 12/27/21
1.7.3.2	Engage Transitioned Resources in VectorVMS	1 day	Mon 12/27/21	Mon 12/27/21
1.7.3.3	Implement new process/procedures to meet Data Security/Cloud Security Requirements	1 day	Mon 12/27/21	Mon 12/27/21
1.7.3.4	Go-Live	0 hrs	Thu 12/30/21	Thu 12/30/21
1.7.4	▲ Project Management	20 days	Fri 12/3/21	Thu 12/30/21
1.7.4.1	Status Meeting	1 day	Fri 12/3/21	Fri 12/3/21
1.7.4.2	Project Plan Updates	1 day	Fri 12/3/21	Fri 12/3/21
1.7.4.3	Issue Tracking	1 day	Fri 12/3/21	Fri 12/3/21
1.7.4.4	Status Meeting	1 day	Fri 12/10/21	Fri 12/10/21
1.7.4.5	Project Plan Updates	1 day	Fri 12/10/21	Fri 12/10/21
1.7.4.6	Issue Tracking	1 day	Fri 12/10/21	Fri 12/10/21
1.7.4.7	Status Meeting	1 day	Fri 12/17/21	Fri 12/17/21
1.7.4.8	Project Plan Updates	1 day	Fri 12/17/21	Fri 12/17/21
1.7.4.9	Issue Tracking	1 day	Fri 12/17/21	Fri 12/17/21
1.7.4.10	Status Meeting	1 day	Thu 12/23/21	Thu 12/23/21
1.7.4.11	Project Plan Updates	1 day	Thu 12/23/21	Thu 12/23/21
1.7.4.12	Issue Tracking	1 day	Thu 12/23/21	Thu 12/23/21
1.7.4.13	Status Meeting	1 day	Thu 12/30/21	Thu 12/30/21
1.7.4.14	Project Plan Updates	1 day	Thu 12/30/21	Thu 12/30/21
1.7.4.15	Issue Tracking	1 day	Thu 12/30/21	Thu 12/30/21
1.7.4.16	Create and Schedule Reports to track Purchase Order Burndown	1 day	Thu 12/30/21	Thu 12/30/21

In our final weeks, starting with week eight, we will begin training sessions with all identified agency users and providers. During this time, we will provide online training for providers and distribute training materials, login notifications, and user guides. In the final two weeks, we will engage all transitioned resources in VectorVMS®, implement any new processes required to meet Data Security requirements for IDOA and prepare for go-live on December 30.

After go-live, we will continue to hold weekly status meetings with IDOA until July 1, 2022 to ensure all questions or issues with the implementation are resolved. At this time, our Senior Account Manager will take primary responsibility for the engagement. In addition, if PeopleSoft integration is desired, we will begin work to prepare for the integration to Peoplesoft approximately 30 business days after the implementation is complete, or when IDOA determines a timeframe to move forward with this project. We have provided a high-level project schedule for PeopleSoft integration as part of our Implementation Plan.

- 2.4.11.2 Please describe how long, starting from notice of award, it will take for your provider network to be ready to receive requests from State users and meet all requirements set out in this RFP.

CAI has managed provider relationships in our MSP programs since 2004. Today, we are successfully managing over 2,100 provider firms nationwide. CAI will onboard firms starting with our first week of award, as we have already begun the outreach process to add providers to our network, should the IDOA award CAI the contract. Our implementation plan includes detailed tasks for reviewing the

current network, providing outreach to providers currently working with the IDOA program, and enrolling providers into our network. In most cases, our implementation spans 6 to 8 weeks from award, with providers ready to receive requests on the day of go live of the program.

CAI recognizes the need for a scalable provider network which easily adapts to market supply and demand and provides a wide range of IT skills required by such a large enterprise. CAI views our providers as critical business partners, and we maintain an ongoing and collaborative line of communication with them. We have made a huge investment in our provider networks, spending hours recruiting, training, and coaching IT firms to join and participate successfully in our programs. Because of this partnering approach, CAI's providers demonstrate a real commitment to the program, which translates into speed, accuracy, and quality service delivery back to IDOA.

2.4.11.3 Please describe how you will work with the State to transition State-identified providers, resources, and projects into the resulting contract.

CAI currently has a provider network of over 2,100 companies across the United States and has provided a list of interested providers as part of this proposal. Our experience has provided key lessons learned on how to efficiently onboard our Provider network in a new engagement. We will:

- Work with providers who have engaged resources under the current contract – many of which are likely already working with CAI in other MSP programs – to enroll them in our new program
- Use a streamlined enrollment process via an online portal, designed to allow providers to fulfill basic contract enrollment/compliance requirements as quickly as possible
- Provide an open network which allows any interested provider to enroll at any time
- Process enrollments using CAI's Vendor Management team and provide updates on the enrollment status of Providers throughout implementation

During the implementation, CAI will use the transition data provided by IDOA to assign our Account Managers to assist agencies throughout the implementation process. We will meet with agencies to introduce transition activities, review each agency's needs, and confirm they are assigned to an Account Manager who can best service their organization. The Account Manager will serve as the point-of-contact for the agencies during implementation and throughout the life of the contract.

2.4.11.4 Please provide a detailed training plan for all users, including State End Users and providers. Please include the methods used, locations, and frequency of offerings. In your response, please identify the standard training and any customized training that is available to reflect individual department or institution needs, and include any limitations such as class sizes, locations, and time limits.

CAI has extensive experience providing training on our VMS system. Training for program staff focuses on key topics. Our approach to presenting these topics is tailored to program staff requirements and availability. 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 for users who may have time restrictions and are unable to sit through several hours of training at one time.

To accommodate the schedules of IDOA personnel, several methods of training delivery are offered:

- Training with real-time webinars using Microsoft Teams or similar solution during COVID-19 will be priority

- We will take guidance from the State on in-person training as restrictions are eased.
- Training can be conducted in multiple sittings or completed over several days, depending on State requirements and availability. Typically the larger training is conducted during implementation and then as needed during the life of the contract.
- 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.

We will limit class size under State guidelines.

Additionally, throughout the life of the programs, users have 24x7 access to training materials via VectorVMS®'s 'Guide Me' functionality, which includes online training guides and recorded training videos

In the weeks prior to go-live of the new contract, CAI will offer real-time training webinars to the client user community focusing on the key topics shown below.

Training Plan for Users

- VectorVMS® Navigation – Users are trained on how to navigate through the pages in VectorVMS®.
- Creating a Requirement – Users who submit requisitions are trained on the process of creating a requirement within VectorVMS®.
- 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®.
- 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®.
- Approving Expenses – Users who authorize expense reimbursements on their requisitions are trained on the process of reviewing/approving/rejecting expenses within VectorVMS®.
- Approving Timesheets – Time approvers are trained on the process of reviewing/ approving/rejecting timesheets within VectorVMS®.
- Evaluating a Candidate – Users with engaged resources are trained on the process of evaluating the engaged candidate within VectorVMS®.
- Reporting – Users have the opportunity to learn how to run and/or create their own reports within VectorVMS®.

Training Plan for Providers

- Training for providers will follow a similar plan:
- VectorVMS® Navigation – Users are trained on how to navigate through the pages in VectorVMS®.
- Reviewing a Requisition – Providers are trained on the information provided by Users on a requisition and the key data points within VectorVMS®.
- Submitting a Candidate – Providers are trained on the process of submitting candidates in VectorVMS®.
- Submitting Timesheets – Providers and engaged candidates are trained on the process of submitting timesheets within VectorVMS®.

- Submitting Expenses – Providers and engaged candidates are trained on the process of submitting expenses within VectorVMS®.

To accommodate the schedules of providers, different methods of training delivery are offered:

- Training with real-time webinars using Microsoft Teams or similar solution
- Online training guides available to the providers stored in VectorVMS®

CAI's goal is to provide training so users within IDOA and our providers are fully cognizant of the features and capabilities of the VectorVMS® system so that they can take advantage of available functionality. Our processes are provider neutral, and we are currently using VectorVMS® for our VMS, but we would adopt the same processes for any other VMS systems required.

2.4.11.5 Please describe any information sessions or regular training meetings that may be held, including locations, frequency of offering, and draft agendas.

Training will be available throughout the life of the program, including both self-driven training through the recorded videos, VMS Guide Me functionality, various 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.

The use of BI as VectorVMS®'s reporting tool provides multiple methods of access to real-time metrics. While other VMS applications perform nightly backups of data to a reporting database, reports from BI in the VMS allow for ad hoc and scheduled reporting against up-to-the-minute data, which can be exported to MS-Excel .xls and .xlsx, Adobe .pdf, and .csv files. As part of our solution, CAI provides a specialist Analytics team, made up of expert report writers experienced in quickly creating reports for specific needs, or in training users to access the system to create their own reports. All reporting security mirrors the security within the VMS; this means that when a user runs a report, he/she can only see the data they have access to within the VMS.

All reports within the system can be scheduled for delivery per a specific timeline, e.g., for purposes such as quarterly business reports and reviews, and to a specified Authorized User or at the enterprise level.

There are 115 standard reports, summarized in the accompanying table, that cover over 1,800 data points. These reports are presented around a series of topics that address program performance and delivery, requisition detail, candidate detail, engagement detail, usage across the program, spend, service level metrics, configurations data, and other useful information. The repository of standard reports is constantly being expanded by VectorVMS®, and we welcome the opportunity to explore areas in which these reports can be implemented to benefit IDOA. An example of standard reports appears in Appendix 8 VectorVMS® Standard Reports.

Standard VectorVMS Reports	
Type	Reports
Requisitions	12
Candidates	21
Engagements	16
Time, Expenses, Financial	25
Management & Compliance	19
Services Procurement	7
Configuration Data	12
Privacy Notice	3
Totals	115

2.4.12.3 Please explain your VMS's capability to generate custom or ad hoc reports and support options.

Ad hoc and custom report generation is a feature of our service and is a not cost option. CAI can generate any number of ad-hoc reports requested and can also train both IDOA and Hiring Managers on how to generate performance reports themselves; the more familiar a user becomes with the system, the more they can explore the rich features available. Any user with reporting permissions can take advantage of advanced editing capabilities to modify existing reports or create new reports for personal use or to be shared throughout the organization.

Users can create, or request creation of, custom reports and graphs to support their individual reporting requirements and modify their reports as desired. All standard and user-defined fields within the VMS are selectable as reporting criteria. Candidate information is represented within the reporting tool as a single "universe" of data. Users can select from all defined fields to build the report structure and then use those same fields to differentiate the data that is reported based on date ranges, agencies, manager names, job classes, and many other options. Like any VMS-generated report, custom reports can be saved into public or private folders for later use.

Examples of ad-hoc reports appear in Appendix 9 VectorVMS® Custom Reports.

2.4.13 Custom Programs

- 2.4.13.1 Please confirm your review and understanding of Attachment M – Agency-Specific Scope of Work for the Department of Revenue (DOR).

We have reviewed Attachment M and understand the requirements

- 2.4.13.2 Please list any edits or comments regarding Attachment M for the State's consideration.

We respectfully request the alteration of the Requirement 3A Background checks, item 3. Indiana driver license verification – must have a "Valid" status. We anticipate resources working on this contract may not be Indiana residents and therefore may not have a valid Indiana Driver License. We request this requirement be removed or changed to "Driver license verification – must have a "Valid" status when role requires resource to drive as part of the engagement.