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Your Public Sector Solutions Center

REQUEST FOR PROPOSALS

For

Artificial Intelligence (AI) Solutions for Public Sector Entities

RFP # 2025-018

Sealed proposals will be accepted until 2:00 PM CT, **January 17, 2025**, and then publicly opened and read aloud thereafter.

Legal Name of Proposing Firm

Contact Person for This Proposal

Title

Contact Person Telephone Number

Contact Person E-Mail Address

Street Address of Principal Place of Business

City/State

Zip

Mailing Address of Principal Place of Business

City/State

Zip

Point of Contact for Contract Negotiations

Title

Point of Contact Telephone Number

Point of Contact Person E-Mail Address

Acknowledgment of Addenda (initial): #1 _____ #2 _____ #3 _____ #4 _____ #5 _____

NOTE: Any confidential/proprietary information must be clearly labeled as “confidential/proprietary”. All proposals are subject to the Texas Public Information Act.

COVER SHEET

RFP Response for Artificial Intelligence (AI) Solutions for Public Sector Entities

RFP #2025-018

As of January 23, 2025

Madison AI

AI knowledge assistants for government staff to
complete requests in minutes, not hours.

www.MadisonAI.com

1. Statement of Understanding

Madison AI understands the work to be done within this proposal. The Madison AI tool was developed to address the many operational challenges that public entities face on a day-to-day basis. Our tool helps to create efficiencies in an employee's work, saving time on routine tasks.

2. References

The following agencies/public sector entities are utilizing the Madison AI tool:

Washoe County, Nevada

David Solaro – Assistant County Manager/Community Services

dsolaro@washoecounty.gov

(775) 328-3624

City of Chanhassen - Minnesota

Matt Unmacht – Assistant City Manager

munmacht@chanhassenmn.gov

(952) 227-1118

Town of Los Altos Hills - California

Dr. Peter Pirnejad – City Manager

Ppirnejad@losaltoshills.ca.gov

Regional Transportation Commission of Washoe County - Nevada

Amber Bowsmith – Principal Analyst

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(775) 332-2141

Reno-Sparks Convention & Visitors Authority - Nevada

Myrra Estrellado – Sales Office Manager

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(775) 827-7737

City of Reno - Nevada

Jackie Bryant – City Manager

bryantj@reno.gov

(775) 334-2253

3. Project-Related Experiences and Qualifications

Category: Artificial Intelligence (AI) Solutions for Public Sector Entities

We appreciate the opportunity to respond to the NCTCOG Request for Proposals for Artificial Intelligence (AI) Solutions for Public Sector Entities. At Madison AI, we believe AI can accelerate the work of our government leaders so they can focus on direct, front-line service for their communities.

This RFP represents an exciting chance to showcase how our government-specific AI solutions, developed through a unique equity business partnership with Washoe County, NV, can address critical challenges, optimize operations, and improve public service delivery for governments.

3 a. Madison AI's Capabilities & Expertise

Technical Expertise: Building AI and Custom LLMs for Regional and Local Governments

What is Madison AI?

Madison AI creates AI assistants and custom-built government large language models (LLMs) for government leaders to save 5 hours a week on tasks they do every day, like staff reports, fiscal analysis, zoning and code lookup, and researching previous actions.

Madison AI creates department and function-specific LLMs built from your government's public and private data – like board/council meeting minutes, agenda packets, staff reports/memos, codes, laws, master plans, internal policies, and other relevant documents.

What is Madison AI Solving with Generative AI?

Madison AI is built to address three of the most common challenges faced by governments today, including:

- **Reducing the Administrative Burden:** Agencies and government leaders are buried in common, repetitive AND necessary tasks to run government effectively.

- **Protecting Institutional Knowledge:** The wave of retirements and the volume of open positions is creating a huge loss of organizational knowledge.
- **Creating More Capacity to Meet Service Demands:** Empowering staff and citizens with easier ways to complete workflows creates more capacity to do direct service.

Technical Expertise in Building LLMs/AI Assistants for Government

We build custom LLMs and AI applications that are tailored specifically to government data and used to deliver accurate, complete results for our customers. This includes:

- **Proprietary Data Ingestion for Government Files:** Our system uses proprietary techniques to convert government documents—like council packets, ordinances, and reports—into machine-readable formats. This ensures our AI can quickly and accurately process files, making government data accessible and usable.
- **Agentic Retrieval-Augmented Generation (RAG) Designed for Government Use:** Our Agentic RAG framework combines large language model (LLM) capabilities with a specialized retrieval system built exclusively for government data. It securely integrates with structured and unstructured datasets such as meeting minutes, staff reports, zoning codes, master plans, and other commonly accessed government data. This ensures accurate, context-aware responses tailored to government-specific use cases, enabling leaders to access actionable insights and complete complex tasks in minutes.
- **Government-Specific Outputs:** Our application is designed to generate outputs tailored to government needs, such as staff reports, memos, budget summaries, and policy briefs. These outputs are formatted and structured to meet public sector standards, saving time and ensuring consistency in official communications.
- **Built in Microsoft Azure:** Madison AI is built and deployed in Microsoft Azure to seamless integration with your government work environments (including Google and Microsoft).

Why Governments Work with Madison AI

Built By/For Government Use – Equity Business Partnership with Washoe County, NV

Madison AI is co-owned with Washoe County, NV, and guided the use cases and development of the product to accelerate everyday tasks for local government leaders. We consistently save leaders 5 hours a week on their tasks and saved one county roughly 260 hours of staff time last month November alone. [Source – Washoe County Fathom usage metrics]. Madison AI:

- Is based on hundreds of thousands to millions of your government's files:
- Delivers accurate and complete responses to your research questions and report drafts.
- Cites all results from your data to prevent hallucination.
- Is built and secured in the Microsoft environment for easy integration and deployment.
- Stays current with automatic weekly data updates from your files.

No/Low IT Resources are Required for Deployment

One of the key advantages of Madison AI is that it requires no coding or IT resources from your team. Our team handles the entire process—from initial setup to full integration—ensuring a seamless deployment that minimizes disruption to daily operations.

The Madison AI team manages data ingestion, system configuration, integration, and ongoing data management with your existing tools and platforms, so government leaders and staff can focus on their core responsibilities. This hands-free approach eliminates the need for technical expertise on your end, making Madison AI an accessible and stress-free solution for public sector entities of all sizes.

Madison AI can build and deploy a custom LLM for governments in less than 30 days.

No Obligation Pilots

Governments can have a custom-built, no-obligation pilot built using their publicly available data to try Madison AI for 30-45 days.

Project Management Approach

Madison AI guarantees that all services performed under this proposal will meet the highest standards of quality, professionalism, and integrity. We are committed to delivering results that align with the scope of work, agreed timelines, and project objectives, ensuring that the organization receives exceptional value and reliable outcomes. Our guarantee includes the following commitments:

Expertise and Precision:

All services will be executed by highly skilled professionals with demonstrated expertise in their respective fields. We guarantee that our work will adhere to industry best practices.

Timeliness:

All services and deliverables will be completed within the agreed timelines, barring any unforeseen circumstances beyond our control. Should delays occur, communication regarding a revised timeline to minimize disruptions should be provided promptly.

Compliance and Accuracy:

Our work will comply with all applicable local, state, and federal regulations, as well as ethical and data privacy standards, ensuring full alignment with your agency's internal policies.

Satisfaction and Support:

Madison AI is committed to client satisfaction. If any aspect of our services fails to meet expectations, we will address the issue promptly and make necessary adjustments to ensure a successful outcome.

Post-Delivery Support:

We will provide post-delivery support, ensuring a smooth transition and addressing any questions or concerns that arise after implementation.

Team Qualifications & Key Personnel

Erica Olsen, CEO and Co-Founder / AI Technologist

Professional Experience:

Before founding Madison AI, Erica co-founded OnStrategy, a strategic planning consulting and software company in Reno, NV. She's dedicated most of her career to helping leadership teams around the globe achieve their visions of success through thoughtful, focused strategic planning and execution.

In 2024, she led the team at OnStrategy in developing Madison AI in collaboration with Washoe County, NV. She embraced Madison AI's potential to empower regional governments to meet increasing citizen service demands during revenue stagnation.

You might also know her from her book, *Strategic Planning for Dummies*, and YouTube Channel, *The Virtual Strategist*, where she has guided thousands of organizations through the strategic planning and execution process. Her content reaches over 1 million users annually.

She and the strategist experts work with leadership teams around the globe—businesses, nonprofits, governments, tribes, and school districts that share one thing in common: the desire to have a bigger impact within their sphere of influence and the world.

- **Government:** City and County of San Francisco, City of Reno, Washoe County, Charlotte-Mecklenburg Police Department, Dona Ana County, Reno-Tahoe Airport Authority
- **Education:** Alaska North Slope Borough School District, Anchorage School District, Fairbanks North Star Borough School District, Washoe County School District, Kenai Peninsula Borough School District
- **Sustainability:** Patagonia, Outdoor Industry Association
- **Technology:** Microsoft, SEO Monitor, Authority Partners
- **Tourism:** Reno-Sparks Convention & Visitors Authority, MGM Resorts
- **Non-Profit:** The Make-A-Wish-Foundation, Tahoe Fund, Northern Nevada Children's Cancer Foundation

Education: Master's of International Business Management from Thunderbird School of Global Management; Bachelor of Arts in Communication, University of Nevada, Reno

Publications: *Strategic Planning for Dummies* and *Strategic Planning Kit for Dummies* (2011)

Kristine Richter, Head of Client Success @Madison AI

Professional Experience:

Kristine is a seasoned leader with over two decades of experience spanning community leadership, education, and technology. Kristine honed her skills in streamlining administrative processes and supporting strategic planning as the office manager for Richter Financial. As the Head of Client Success at Madison AI, Kristine's background in research and analysis, as well as strategic operations, makes her a valuable member of the team as she supports projects with data-driven insights.

Education: University of Oregon, Bachelor of Arts, Japanese and History

Todd Ballowe, Lead AI Solutions Architect

Professional Experience:

As the Lead AI Solutions Architect, Todd takes pride in spearheading the development of our proprietary, award-winning web-based Planning Template. He thrives on tackling complex challenges, coding custom reports with agility, and ensuring seamless digital experiences for our clients. With a finger always on the pulse of the ever-evolving landscape, Todd is committed to delivering innovative, cutting-edge solutions that keep our web presence clean, modern, and impactful. Some of his recent projects include:

- **Charlotte-Mecklenburg Police Department:** Coded Bureau-specific custom reports, a crime-data API upload tool, and a success factors data integration tool.
- **Region of Durham, Ontario:** Produced a custom report meeting Web Content Accessibility Guidelines and government web standards in Canada.

Education: IWA Certified Web Professional; Google Analytics Certified; Google Mobile Analytics Certified; Adobe Certified Web Designer; BA in Creative Writing from the University of Illinois.

3 b. Madison AI Past Projects

Washoe County, Nevada

Madison AI built custom, closed LLMs and AI assistants to reduce the administrative burden for Washoe County's electeds, staff, and leadership. We built specific AI assistants for countywide governing, planning and development, HR/internal policies, and elected officials.

"It took me 30 minutes to write an A+ staff report about a groundwater remediation plan with Madison AI – it easily saved me 5 hours of time today." – Assistant County Manager Dave Solaro

- **Staff hours saved in November 2024:** 260+
- **Technology Used:** Custom-built LLM using Azure storage, embeddings, and databases. Customized RAG and Azure Application.
- **Active LLMs:** County-wide, Planning & Development, HR/Internal Policies
- **Active Users:** County Manager, Assistant City Manager, Management Analysts, Department Managers, Clerk, Planning, Lobbyists, Elected Officials

City of Chanhassen, Minnesota

Madison AI built custom, closed LLMs and AI assistants to reduce the administrative burden for the city of Chanhassen, MN. We built AI assistants for citywide governing and staff report automation.

"I used Madison AI to draft a City Council report and resolution. The application saved me HOURS of work and wrote a better report than I could have created." - Assistant City Manager Matt Unmacht

- **Staff hours saved in November 2024 month:** 190
- **Active LLMs:** Citywide
- **Active Users:** City Manager, Assistant City Manager, Management Analysts, Department Managers

Los Altos Hills, California

Madison AI built custom, closed LLMs and AI assistants to reduce the administrative burden for the city of Los Altos Hills, CA. We built AI assistants for citywide governing and staff report automation.

- **Staff hours saved last month:** 55
- **Active LLMs:** Citywide
- **Active Users:** City Manager, Assistant City Manager, Management Analysts, Department Managers, Staff, Electeds

Regional Transportation Commission of Washoe County, Nevada

Madison AI built custom, closed LLMs and AI assistants to reduce the administrative burden for the city of the Regional Transportation Commission of Northern Nevada. We built AI assistants for organization-wide knowledge, finance, engineering, and HR.

- **Staff hours saved last month:** 189
- **Active LLMs:** Organization-wide, Finance, HR/Internal Policies, Engineering
- **Active Users:** Executive Directors, Assistant Directors, Department Leaders, Staff

City of Reno, Nevada

Madison AI built custom, closed LLMs and AI assistants to reduce the administrative burden for Washoe County's electeds, staff, and leadership. We built specific AI assistants for citywide governing, planning and development, and business licensing report automation

- **Staff hours saved last month:** 180+
- **Active LLMs:** Citywide, Planning & Development, Business Licensing
- **Active Users:** City Manager, Assistant City Manager, Management Analysts, Department Managers

Reno-Sparks Convention & Visitors Authority

Madison AI built custom, closed LLMs and AI assistants to reduce the administrative burden for the Reno-Sparks Convention and Visitors Authority. We built AI assistants for organization-wide knowledge.

- **Staff hours saved last month:** 30
- **Active LLMs:** Organization-wide
- **Active Users:** Executive Directors, Assistant Directors, Department Leaders, Staff

City of Fresno, California

Madison AI is currently deploying a city-wide knowledge assistant for Fresno, California.

- **Staff hours saved last month:** TBD, in implementation
- **Active LLMs:** Citywide
- **Active Users:** TBD, in implementation

City of Beverly Hills, California

Madison AI is currently deploying a citywide knowledge assistant for Beverley Hills, California.

- **Staff hours saved last month:** TBD, in implementation
- **Active LLMs:** Citywide
- **Active Users:** TBD, in implementation

3 c. Madison AI Company Background

Madison AI is a division of M3 Planning, Inc., as is OnStrategy. M3 Planning, Inc. has been in business since February 2003, helping organizations help build and achieve their visions of the future

Madison AI was formed in April 2024 with a business partnership between Washoe County and M3 Planning, DBA OnStrategy. The initial AI use case was for Madison AI was identified by Washoe County Staff during an AI strategy session lead by the OnStrategy team. A partnership was born after Washoe County wanted OnStrategy to develop a custom, closed LLMs to write staff reports for the Board of County Commissioners using generative AI.

About OnStrategy

Strategy is what we do—whether it’s an organizational strategic Plan or an AI Strategy—and we’re passionate about it. We provide simple, practical tools and hands-on services that help your entity realize the capability of artificial intelligence. In providing you with the right tools and services, our Team will engage the people within your organization and set them on a path to a future that helps them realize the benefits of AI and grow or be more efficient. We’ve learned that a successful strategy is more than having a set of shared values; it includes disciplines, behaviors, and actions, which separate those who achieve success from those who don’t. While best practices in Strategy and AI apply to organizations of all sizes and virtually every industry, our team understands that each organization is unique. So why work with us? Here is what makes us different:

Technical Expertise as Strategic Planning Facilitators

- We are **certified facilitators and strategists**, not just consultants, who focus on strategic planning and helping organizations develop, implement, and track their plans.
- The **facilitation and development of strategic plans for over 700 public and private entities**. Our team has over 20 years of experience running strategic planning processes and utilizes best practices to improve performance.
- With the company started in 2003, we are practitioners with **over 20 years of team experience** working with City and County governments.

- As a boutique consulting firm, our team focuses exclusively on designing, facilitating, and managing strategic plans and incorporating AI strategies with performance/results management processes. Our client teams are comprised of senior, experienced partners.
- Our methodology is built around establishing an **agile planning and results management process**.
- We **follow a holistic approach** designed for organizations to establish a clear direction, align goals and OKRs, implement results management, and build high-performing team cultures.

Technical Expertise as AI Strategy Consultants

- Our **AI Consulting Services** help local governments and organizations leverage Generative AI as a tool to drive organizational change and multiply missions.
- We bring together Strategy Consulting Experts and Technical AI developers to guide teams to identify, prioritize, and roadmap their AI opportunities.
- Our technical teams can help implement the highest-priority AI products that aren't "off-the-shelf" solutions.
- By integrating AI into government operations, we enable agencies to enhance efficiency, scale their efforts, and improve public service delivery—all while maintaining alignment with ethical standards and transparency.

Portfolio of Successful AI Strategies

Madison AI and OnStrategy have a proven track record of implementing AI solutions that drive measurable results for local governments:

- **Washoe County, NV:** Facilitated the development of AI Use Cases, evaluation, and implementation of a custom-built AI assistant for the Manager's Office, Elected Officials, and department-specific knowledge assistance.
- **County of Santa Clara, CA:** Facilitated the development of AI Strategies, Use Cases, and a high-level Roadmap for the Technology Team. Piloted custom LLM for Non-Emergent Dispatch.
- **Reno-Tahoe Airport Authority, NV:** Facilitated a staff-driven process to develop the AI Guiding Principles, Goals, Use Cases, and Roadmap. Prioritized 78 opportunities to 5 top priorities for implementation.

These case studies highlight Madison's ability to deliver scalable, localized, and impactful AI solutions across diverse government functions. The outcomes include increased operational efficiency, improved transparency, and greater citizen satisfaction.

Technical Expertise as Application Developers

- **We've built, managed, and deployed the StrategyHub** – our OKR software for practical, easy strategy development and implementation.
- **Our team has been designing, building, and deploying SaaS applications for more than 15 years.** We have served thousands of clients in the public and private sector.
- **Boasting 300+ clients**, the award-winning system includes a Visual Performance Dashboard and Performance Reports that provide dynamic, interactive and customizable reporting for crystal-clear clarity on organizational, department (if applicable) and individual performance.
- **We co-designed Madison AI with Washoe County – your knowledge assistant for local governments** – for elected officials, leaders, and staff to access every board decision, agenda, and master code in your library for use across various government departments.

Madison AI's Mission & Ethical Standards

At Madison AI, our mission is to save every government leader 5 hours a week on their everyday work tasks so they can focus on more impactful, community-facing work. Our core values and ethical standards as developers of AI for regional and local government:

- **AI is a Mission Multiplier.** We believe in the use of AI to enable organizations to have a bigger impact in their mission calling. This is our big why.
- **Protect & Safeguard Data.** Our commitment to protecting customer and proprietary data is unwavering; we will not compromise it by uploading sensitive information into AI systems. We will continue to develop and apply strong safety and security practices to avoid unintended results that create risks of harm.
- **More Time for Humans to Do Human Things.** We affirm that AI will not replace human jobs within our organization; rather, it will serve as a tool for enhancement.
- **Encourage Experimentation.** Experimentation is key to innovation. We will embrace trial and error in our AI endeavors, learning and adapting as we go.
- **Avoid Unfair Bias.** We pledge to meticulously examine data sets for bias and take steps to prevent the reinforcement of such biases through our AI applications.
- **Be Accountable and Transparent.** We will design AI systems that provide appropriate opportunities for feedback, relevant explanations, and appeal. Our AI technologies will be subject to appropriate human direction and control.

4. Technical Proposal – Scope of Work

Custom LLM Development (Specific Use Case Deployment)

Many AI use cases are based on custom, internal LLM development. We built custom, function-specific LLMs for regional, local, and state governments. Our tool, called Madison AI (www.madisonai.com), is a public and private sector collaboration in the pursuit of good government. Madison AI was developed in an equity business partnership between the Madison AI and Washoe County in Reno, Nevada.

Together, we combine inside government expertise and external development power to build custom LLMs and artificial intelligence tailored and tuned for local government. Madison AI is like ChatGPT for elected officials, leadership, and staff to access every board decision, agenda and master code in a government entity's library. Our tool provides:

- **Artificial intelligence that accurately references and researches** your entire database of codes, master documents, and previous board actions for the past 5+ years.
- **Custom-built report outputs** built to a government standards. Examples include staff reports/memos, board briefings, planning and development staff reports, business licensing staff reports, or any other high-volume government report with a has a clear structure. Our tools reduced report production times by 80% in a time study from the City of Reno.
- **AI summaries and insights for an elected board/body** to receive smart summaries of agenda items and attachments, suggested questions, and a tool to research any previous board action, code, or history of a topic.
- **Department-specific AI assistants that are secure, error-checked, and GPT-4 omni-fast.** Madison's artificial intelligence only uses your library of data and error checks results against your database of public records and master authority documents.

Challenge Objectives

Madison AI serves as an AI solution to assist in and alleviate the following operational challenges that public sector entities experience. Here is a brief overview of our tool:

Government Function	For Whom	Example Data	Key Uses
Agency-Wide	All Senior Staff Clerk All Dept Heads Staff	Public Meeting Minutes, Staff Reports State Law, Strat Plans	<ul style="list-style-type: none"> • Answer a Question (e.g. Policy, Code, Ordinance) • Detailed Timeline on a Topic • Voting History • Writing Staff Reports
Planning & Development	Planners	Development Code, Master Plans, Ordinances, GIS Data	<ul style="list-style-type: none"> • Parcel Historical Search • Allowable Uses Lookup • Code, Parcel & Project Analysis • Code Comparison
Finance & Budgeting	Finance & Budget Directors Senior Staff	Budgets, ACFRS, CAFRS	<ul style="list-style-type: none"> • Initiative, Expense, Revenue 5-Yr. Lookback • Anomalies & Insights • Budget Narrative
HR/Internal Policies	All Staff	All HR Policies	<ul style="list-style-type: none"> • Policy Lookup • Policy Comparison • Policy Drafting
Grants	Grants Managers	Previous Grants, Budgets	<ul style="list-style-type: none"> • Drafting Grant Submissions • Project Summaries & Reporting
Public Meeting Assistant	Elected Officials Senior Staff All Dept Heads	Agenda Packets, Meeting Transcripts	<ul style="list-style-type: none"> • Smart Summary by Agenda Item • Policy Compare to other Jurisdictions • Post-Meeting Summary of Action
Other Government Functions	Executives, Managers, and Staff	Dependent Upon Use Case	<ul style="list-style-type: none"> • Convention and Visitor Bureau AI Assistants • Water Authority AI • Road and Engineering AI Assistants • Health and Human Services AI Assistants • EMS Training AI Assistants

4 a. Project Deliverables

Deliverable: Organization-wide/Governing Custom LLM

Madison AI reduces the administrative burden on government leaders to retrieve, research, and create the critical information governments need to efficiently run a regional or local government. Madison AI saves leaders, staff, and elected officials time on their everyday work tasks so they can focus on human first work. Madison AI and custom LLMs will accelerate work in these common administrative and government-wide workflows:

Policy Analysis

Madison AI enhances policy analysis by offering the following capabilities:

- **Policy Comparisons:** Evaluates proposed policies against current policies, codes, and statutes to highlight differences and alignments.
- **Executive Summaries:** Generates clear, concise summaries of policy and agenda items for elected officials.
- **Staff Analysis Support:** Provides in-depth analysis of current policies to aid staff decision-making.
- **Code and Statute Insights:** Integrates zoning and parcel data into policy reviews for comprehensive understanding.

Enhanced Governing Body Decision-Making Process

Madison AI supports decision-making processes with:

- **Accurate Staff Reports:** Delivers consistent, accurate, and complete reports to guide the governing process while reducing staff workload.
- **Time Savings:** Saves staff hours by automating the creation of reports and analyses.
- **Executive Summaries for Officials:** Prepares detailed yet digestible summaries of policy and agenda items for elected officials to facilitate quick decision-making.

Completing Board Requests

Madison AI simplifies and accelerates board requests by providing:

- **Comprehensive Research:** Delivers complete summaries and histories of any topic spanning over five years.
- **Multi-Year Funding Summaries:** Creates detailed financial overviews for topics requiring funding insights.
- **Community Partner Analysis:** Identifies key community partners and stakeholders to engage for gaining support.

- **Community Sentiment Analysis:** Synthesizes public comments and sentiment to understand community perspectives on specific issues.
- **Voting Record Reviews:** Compiles and reviews previous voting records to provide historical context for decision-making.

Drafting Staff Reports

Madison AI automates the creation of comprehensive staff reports, memos, or other standard government reports including:

- Background analysis with references to relevant codes, laws, and master documents.
- Summaries of board actions over the last 5 years on planning topics.
- Funding summaries and fiscal impact analyses.
- Staff recommendations and motion reports for board approval.
- Reports are error-checked, cited, and downloadable in Microsoft Word for seamless integration into workflows.

Preparing for Council Meetings

Madison AI ensures staff are well-prepared, informed, and equipped to engage effectively during council meetings. Madison AI simplifies and enhances preparation for these meetings by offering the following capabilities:

- **Elected Official Insights:** Researches each official's positions and analyzes positive and negative sentiment for informed engagement.
- **Question Prediction:** Anticipates potential questions from elected officials based on past discussions and topics under review.
- **Voting Strategy Support:** Pre-drafts approaches and talking points to help secure favorable votes on agenda items.
- **Council Sentiment Analysis:** Tracks voting patterns to determine who voted, how they voted, and overall council sentiment on issues.
- **Community Sentiment Analysis:** Synthesizes public comments and community sentiment, offering actionable insights into public opinions on key topics.

These features ensure staff are well-prepared, informed, and equipped to engage effectively during council meetings.

Deliverable: Planning and Zoning LLM

Madison AI accelerates the work of planning and development by reducing the administrative burden on government teams. We accelerate daily, time-consuming tasks like searching for historical approvals, summarizing codes and regulations, and drafting staff reports, allowing teams to focus on higher-value work. **Madison AI Government and Finance LLMs accelerate these work tasks:**

Property Searches

Madison AI enables comprehensive property searches, including historical approvals, discretionary permits (e.g., special use permits, tentative maps, variances, abandonments, parcel maps), and boundary line adjustments. It provides quick access to all historical and current property records for informed decision-making.

Parcel Analysis for Allowed Use and Compliance

Madison AI analyzes parcels for compliance with zoning, density, parcel uses, conditions of approval, and code standards. It ensures accurate evaluations of allowed uses and flags non-compliance issues for corrective actions.

Complete Code Lookup

Madison AI performs complete code lookups, including topic research and summaries of code history. It identifies and resolves inconsistencies in the code, ensures accurate responses to inquiries, and provides clarity on complex regulatory topics.

Regulatory Compliance

Madison AI ensures planning and development projects comply with local, state, and federal regulations. It cross-references project data with regulatory frameworks to minimize risks and maintain compliance.

Land Use Planning

Madison AI supports land use planning by interpreting zoning laws and providing actionable insights on how land in specific areas can be used. It helps planners implement zoning laws effectively to meet development goals.

Identifying Code Discrepancies

Madison AI identifies and resolves code discrepancies by performing detailed topic research, summarizing conflicting codes, and providing accurate answers. It ensures consistency and eliminates ambiguity in code enforcement.

Drafting Planning Staff Reports

Madison AI automates the creation of comprehensive planning staff reports, including:

- Background analysis with references to relevant codes, laws, and master documents.
- Summaries of board actions over the last 5 years on planning topics.
- Funding summaries and fiscal impact analyses.
- Staff recommendations and motion reports for board approval.
- Reports are error-checked, cited, and downloadable in Microsoft Word for seamless integration into workflows.

Deliverable: Government Finance & Budgeting LLMs

Madison AI supports financial forecasting by analyzing historical data on initiatives, expenses, and revenue trends over a five-year period, helping leaders identify patterns and make data-driven decisions for future budgeting. It optimizes budget allocation by consolidating and presenting financial data in clear, structured narratives that explain priorities and expenditure plans, improving transparency and public trust. **Madison AI Government and Finance LLMs accelerate these work tasks as follows:**

Initiative, Expense, Revenue 5-Year Lookback

Madison AI can analyze historical financial data, including initiatives, expenses, and revenue trends, over a five-year period. It consolidates data from various sources, presenting an accurate and comprehensive view of past financial performance. This feature enables government leaders to:

- Assess the success and cost-efficiency of past initiatives.
- Identify trends in revenue generation and spending patterns.
- Use historical insights to guide future budgeting and resource allocation decisions.

Budget Narratives

Madison AI can be configured to generate clear, concise, and well-structured budget narratives tailored for government audiences. It translates complex financial data into easy-to-understand narratives that:

- Explain budget priorities, changes, and allocations in layman's terms.
- Provide context for revenue sources and expenditure plans.
- Align with government transparency requirements to enhance public understanding and trust in the budget process.

Deliverable: Government Human Resource LLMs

Madison AI automates HR processes by streamlining document management, creating performance review structures, and assisting with onboarding tasks like generating personalized welcome packets and checklists. It enhances employee engagement by providing quick access to HR policies and documents, automating responses to FAQs, and delivering structured feedback for performance evaluations.

Madison AI Government HR LLMs accelerate these work tasks:

Employee Onboarding Assistant

Madison AI can assist the onboarding process by automating tasks such as helping create personalized welcome packets, creating onboarding checklists, and answering new employee FAQs. Key benefits include:

- Faster and smoother onboarding for new hires.
- Standardized communication across departments.
- Reduced administrative workload for HR teams.

HR Document Management

Madison AI finds and retrieves policies, HR documents, and contracts efficiently, making document management seamless. Madison AI allow for instant access to relevant documents with a simple query. Madison AI can also help human resource teams with policy comparison.

Performance Review Support

Madison AI can assist in creating and analyzing employee performance reviews by summarizing data, generating structured feedback, creating consistent performance review structures, and helping create more consistent disciplinary documentation. Benefits include:

- More efficient and consistent performance evaluation processes.
- Reduced time spent preparing review documents.

Deliverables: Other Agency or Department Specific LLMs

Madison AI can create department and government agency-specific LLMs that contain hundreds of thousands of documents for research, policy analysis and lookup, and custom report outputs. These LLMs are custom-built for each organization and its specific data set. These include:

- **Grant LLMs:** Madison AI automates grant application writing, compliance tracking, and reporting. It provides summaries of funding opportunities and assists in preparing detailed submissions, saving time and increasing success rates for government agencies.
- **Standard Process LLMs:** Madison AI can manage and analyze internal government documents, ensuring quick retrieval, accurate summaries, and consistent formatting. It simplifies compliance, reporting, and decision-making processes by organizing large volumes of internal files.

- **Health Departments:** Custom-closed LLMs for previous board decisions, policy lookup, finance, grants, and other agency-specific custom report outputs.
- **Airport Authorities:** Custom-closed LLMs for previous board decisions, policy lookup, finance, grants, and other agency-specific custom report outputs.
- **Transportation Commissions and Planning:** Custom-closed LLMs for previous board decisions, policy lookup, planning and development, finance, grants, and other agency-specific custom report outputs.
- **EMS Training:** Custom-closed LLMs that contain response protocols used for quick access and post-call training.
- **Water Authorities:** Custom-closed LLMs for previous board decisions, policy lookup, finance, grants, and other agency-specific custom report outputs.
- **Parks and Recreation:** Custom-closed LLMs for previous board decisions, policy lookup, finance, grants, and other agency-specific custom report outputs.

4 b. Technical Approach

Scope of Work – Methodology for Design and Delivery

Delivering Challenge-Specific Functionality

Madison AI builds a custom LLM for each domain/department-specific function a government wishes to create within our capability (e.g. Organization-wide LLM, Planning & Development LLM, HR LLM, Finance LLM, Business Licensing).

Each LLM is built using a government's data and is a dedicated, custom-built application tailored to solve the outcomes in section 4.A of this response.

See technical diagram on next page for details on setup. **For each custom LLM, Madison AI creates:**

- **Data acquisitions and conversion engine.** We gather your files and convert it into data that can be properly read by Madison AI's LLM. We create systems to gather and convert new data weekly.
- **Vector databases and embeddings.** We extract relevant meta-data from your files. Then, we chunk, embed, and index your data into a custom, closed vector database that is unique to your government.
- **Weekly Data Refresh & Monthly Backups.** We keep your LLM up to date by reindexing weekly, automatically. We backup your database monthly.
- **A dedicated, custom-built application for your government to access.** Madison AI builds a custom application on a dedicated virtual machine for your government to access your LLM.

- **Agentic RAG tuned for government.** We custom-developed our RAG application to with skillsets and document ranking to retrieve relevant data to a user request.
- **Content Generation and processing.** We use natural language processing to generate results to your queries. We content filter for profanity, bias, profanity, and SQL injections. We deliver results with cited sources in contained document storage.
- **Customized report outputs.** We custom develop 3 custom report outputs per LLM.

Natural Language Processing Capabilities

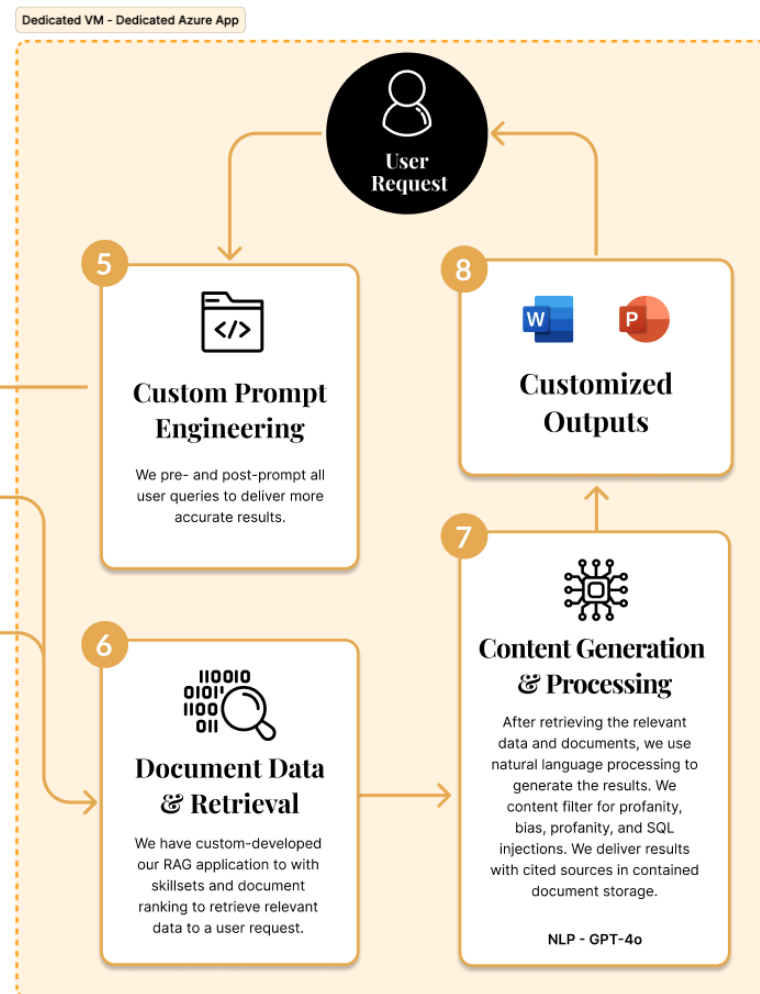
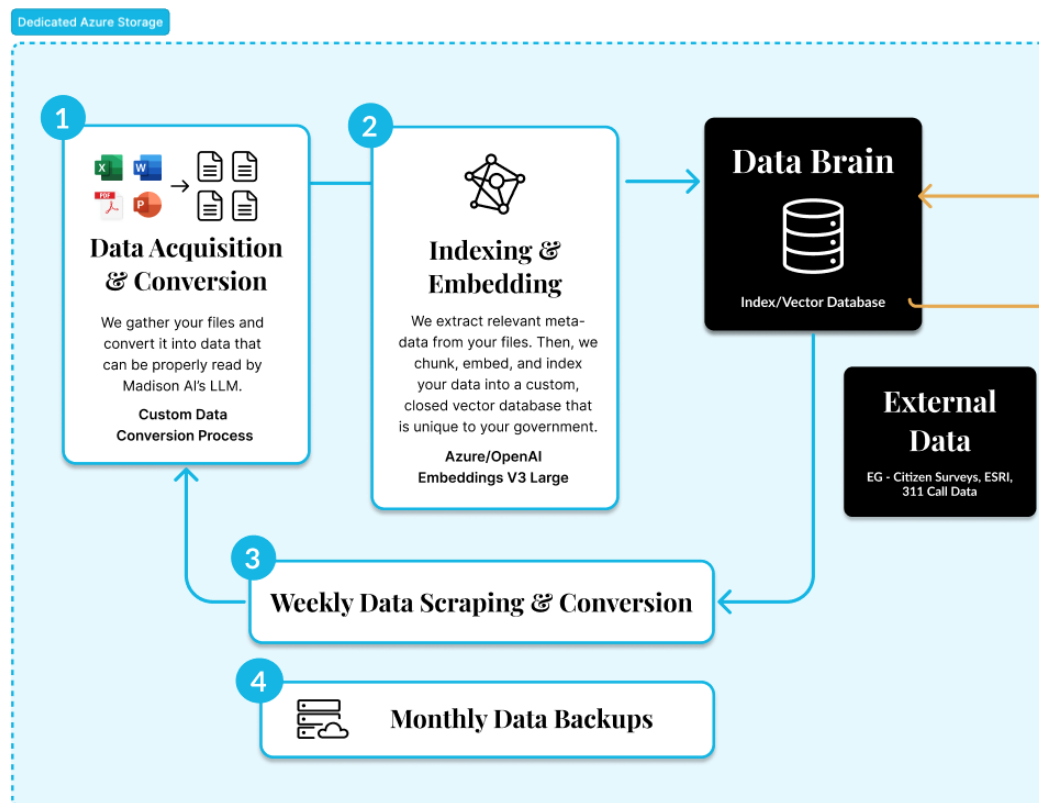
Madison AI uses Microsoft Azure’s natural language processing models, including GPT-4o, GPT-o1, or GPT-01 mini.

Scale

Each LLM/AI product is capable of handling hundreds of thousands to a million files.

Madison AI Application & RAG

Madison AI's Approach to Data Acquisition, Conversion, and Creating a Vector DB



Integration with Systems and Databases

We build our applications inside the Microsoft Azure environment. Each application can be easily deployed and integrated into governments using Microsoft or Google products as the backbone of their email communication, web-based databases (e.g. Sharepoint), or workspaces (e.g. Microsoft Teams).

Databases

Madison AI databases are built and hosted in our commercial Azure tenant, but we can create API keys, dedicated secure upload directories, or FTP file transfers to upload client files into our application database.

User-Friendly and Accessible to All Stakeholders

Madison AI builds dedicated applications that adhere to user interface best-practices and support multi-device access. Madison AI can be integrated into a dedicated Microsoft Teams link, shared as a web kit application for mobile and desktops, or accessed with a dedicated link for each government. These ensure that the application is user-friendly and accessible to all stakeholders.

Maintenance and Updates

Madison AI is continuously updated with new features and enhancements to improve functionality and search quality. These updates are seamlessly applied, ensuring customers always benefit from the latest advancements without requiring any action on their part. This commitment to innovation ensures Madison AI remains a cutting-edge solution for government needs.

Timeline and Training Schedule

The table below represents a standard deployment and training schedule for Madison AI.

Activity	Timeline	Responsible Person
Create client data table and sources	Before Kickoff	Madison AI Manager
Review data in the index and get client sign-off.	Day 1-5	Madison AI Client Manager and Client SME
Establish pilot team. (David)	Executives, Managers, and Staff	Client SME
Approve authentication (SSO) and deployment method with IT Manager.	Day 10	Client SME and Client IT Manager
Setup application in client tenant (IE Teams Channel, Azure App and/or SharePoint).	Day 10-14	Client IT Manager and Madison AI Development Team
Train Pilot Team.	Day 14	Madison AI Manager
Feedback from Pilot team and enhancements as needed.	Ongoing	Madison AI Manager
Customize prompts.	Day 14	Madison AI Manager
*Setup, approve and deploy the staff reports.	Day 14	Madison AI Manager
Host training/deployment session to entire organization (1-2 sessions).	Day 14	Madison AI Manager and Pilot Team
30-Day follow up with entire organization.	Day 30	Madison AI Manager
Utilization Reports	Day 45	Madison AI Manager
60-Day Check-In	Day 60	Madison AI Manager
Ongoing Training	As Needed for New Features	Madison AI Manager

4 c. Performance Metrics

Madison AI delivers accurate, complete results with precise information retrieval. Here is an overview of our benchmark metrics established 01/01/2025. Updates and improvements to these benchmarks are ongoing. RAG applications have standard performance measures, but not industry-standard targets, yet.

Faithfulness: 83%

This checks how reliable the solution is in avoiding false or made-up information. In other words, it ensures the answers are based on real facts and knowledge.

Current: 83% Internally Established Target: 96%

Recall: 89.4%

This measures how much relevant information from all the available facts is successfully included in the answers, ensuring important details aren't left out.

Current: 89.4% Internally Established Target: 90%

Precision: 79.5%

This assesses whether the solution provides answers that are not only correct and accurate but also aligned with what the question specifically asks for.

Current: 79.5% Internally Established Target: 90%

Real-Time Analytics

Madison AI uses Fathom Analytics to provide anonymized user-level usage analytics.

Fathom Analytics is a lightweight, privacy-first analytics solution designed to provide clear insights without compromising user privacy. For AI applications, it offers a seamless way to track key metrics and user interactions, ensuring teams can make informed decisions about system performance and user behavior. Key features include:

- **Privacy-First Design:** Fathom Analytics does not track personal data or use invasive cookies, making it fully compliant with GDPR, CCPA, and other privacy regulations. This ensures AI systems can gather insights while respecting user confidentiality.
- **Actionable Metrics:** It provides concise, real-time analytics on user engagement, session durations, traffic sources, and page views, enabling AI developers to optimize workflows and improve user experience.
- **Simplicity in Integration:** Fathom is designed to be easy to integrate into AI applications, requiring minimal code changes while offering robust functionality.

- **Scalability:** Whether used for small-scale pilot projects or large-scale AI systems, Fathom Analytics adapts to track metrics effectively without introducing unnecessary complexity.

By leveraging Fathom Analytics, AI teams can maintain transparency, optimize application performance, and make data-driven improvements, all while upholding the highest standards of privacy and compliance.

Quality Control

Madison AI provides explainability through context-centric outputs, generating responses grounded in original source documents like local government public records and strategic plans. The system's quality control measures include citations noted whenever possible, allowing users to trace the origin of information. It also integrates user feedback via a thumbs-up/thumbs-down mechanism to enhance performance.

4 d. Risk Management

Risk Management

- An agency's Madison database is built on public records and master authority documents, making it risk-averse to security leaks. It is also built on Azure with end-to-end encryption.
- **Processing Environment.** Data processing is handled via Azure AI Search with built-in security features.
- **Input Validation.** User inputs are validated to prevent injection attacks or malicious code.
- **No Reverse Connectivity.** Madison AI does not initiate connections to client environments, eliminating the risk of "infecting" systems.

Data Auditing and Monitoring

The Madison AI system continuously monitors for anomalies, with logging, real-time alerts using Azure Alerts, and automated mitigation.

Threat Detection and Response

Madison is proactive in its efforts to prevent attacks and ensure security within its system as follows:

- **Processing Environment:** Data processing is handled via Azure AI Search with built-in security features.
- **Input Validation:** User inputs are validated to prevent injection attacks or malicious code.
- **No Reverse Connectivity:** Madison AI does not initiate connections to client environments, eliminating the risk of "infecting" systems.

4 e. Compliance and Standards

Data Security & Privacy

Although Madison AI only stores publicly available data, it is a Microsoft Azure App, compliant with [Microsoft's Data Protection](#) policies. Firewalls and Microsoft Defender are active on any applicable resources. In addition, our application uses Microsoft Authentication with App Registration to manage user access securely, including:

- We leverage **Microsoft Entra Directory** for Single Sign On (SSO) authentication, benefiting from robust security features in the Microsoft ecosystem.
- The application is **multi-tenant**, supporting users from any Microsoft Entra Directory.
- Restrictions allow requests only from specific tenants, **including the client and Madison AI**.

Algorithm Transparency

Madison AI leverages OpenAI's GPT-4o model, which has undergone extensive efforts to mitigate biases related to gender, race, socioeconomic status, disability, culture, age, or other protected classes. However, the system's responses are grounded in the source documents it accesses local government public records, master plans, strategic plans, and zoning/code documents. These documents may contain inherent biases reflective of historical and societal contexts.

The Madison AI RAG methodology is built to ingest and process thousands of files in the data retrieval process. This builds the AI's response on numerous cross-referenced files. We also prioritize the official records, such as laws, codes, and voting records.

Continuous Improvement

Madison AI is designed to prioritize the most recent data updates, ensuring it uses the latest information for generating responses. Users can provide feedback through a thumbs-up/down mechanism, specifying issues like missing citations or irrelevance, which is used to improve the system over time. Monthly dataset updates ensure ongoing accuracy and relevance, and the system's logic helps manage data redundancy effectively. Although the model itself isn't fine-tuned based on user input, feedback is utilized to enhance search algorithms and overall system reliability, ensuring robust handling of various data and user interactions.

The user feedback is stored in a Cosmos database. Once we have enough user feedback from that specific jurisdiction (each jurisdiction has a dedicated environment, so it is just that agency's feedback) we aggregate the data and use the processed feedback to update the RAG logic.

Interoperability

Madison AI is a Microsoft Azure App. Therefore, it is embedded in the Microsoft ecosystem, automatically showing up as an application in M365 and O365. Additionally, as with all AI solutions, Madison AI is built as microservices, where each microservice can be engaged through API calls and endpoints. This enables Madison AI to be integrated with and ingest data from any system authorized by the client.

Data Governance & Cybersecurity Provisions

Data Integrity and Accuracy

- Madison error checks its output against the agency's approved minutes and master documents. It also provides full citation of every data point to eliminate "AI drift."
- Madison accurately references and researches your database of decisions and policy, including:
 - Historical accuracy of previous Board actions back 5 years.
 - Reference to Board authorities, master documents, and current policies.
 - Style & grammar check against the style guide. (e.g. Oxford comma)

Data Privacy and Compliance

Madison AI is a Microsoft Azure App, compliant with Microsoft Data Protection policies:

- Data is **NOT** available to other customers, OpenAI, or Microsoft.
- Data is **NOT** used to improve models for third parties or Microsoft services.
- Azure OpenAI operates within Microsoft's controlled environment, disconnected from OpenAI services.
- Data is **NOT** shared with any organization or user outside of the customer's tenant.

Data Access Controls

Role-based access control (RBAC) ensures users have the least privilege necessary. In addition, the Madison AI application uses Microsoft Authentication with App Registration to manage user access securely, including Microsoft Authentication.

Data Retention and Disposal

- Stored data is indexed and vectorized for AI processing and user conversations and is stored in Azure Cosmos DB. Sensitive personal data is not stored, and unnecessary data is securely deleted.

- **Retention:** Data is stored in the vector database and retained for the duration of the customer's active status with our services. Regular backups and disaster recovery plans minimize risks of data loss.
- **Temporary Storage:** Files uploaded by users are considered temporary and stored for a limited time to support application functionality. User-uploaded files will be automatically deleted after 30 days from the date of upload or sooner if no longer needed for application operations.
- **Deletion After Termination:** Upon cancellation or termination of service, all vector database entries associated with the former client are retained for an additional 10 days to allow for any necessary reconciliation or data export. After 10 days post-cancellation, all customer-related data in the vector database will be permanently deleted.

Encryption

Encryption is applied to data both at rest and in transit for enhanced security.

- **Data Storage:** 256-bit AES (Advanced Encryption Standard)
- **Data Transmittal:** TLS (Transport Layer Security) 1.2 is required for the minimum level of access

Vulnerability Management

To ensure compliance with vulnerability management, we adhere to the Azure Security Benchmark guidelines. Continuous vulnerability assessments are conducted to identify potential security weaknesses in our system. Secure configurations for all assets are maintained and regularly reviewed to mitigate risks.

We have automated alerts plus manual reviews to support quick incident response to address and mitigate the impact of security incidents. We ensure compliance with regulatory requirements and maintain detailed records of vulnerability management activities for auditing purposes. We use MS Defender as the standard evaluation tool

Security Governance Framework

Madison AI applies Responsible AI Principles using this functionality:

- Accuracy is achieved by only using your data set.
- Completeness of results by engineering long-form response.
- Full citation of every data point to eliminate "AI drift" & hallucinations.
- Prioritization of master docs and policies to "weight" authority content.
- Error checking against relevant "master documents."
- Data is current through monthly reindexing.

5. Proposal Pricing

See spreadsheet next page

Category 1 - AI Solutions

Pricing Format Request Example

Notes:

1. This pricing sheet is an EXAMPLE of how pricing should be submitted for RFP 2025-018.

2. Please provide unit pricing for each proposed item, including a percentage discount offering, if any.

3. Use as many lines as necessary.

4. Detail any additional information.

Description	Add additional description if necessary:	Unit Price	% Discount	Notes/Comments
1. Software Licensing and Subscription Costs: Annual Licensing Fee LLM #1:	Subscription includes: - Unlimited staff use - Auto indexing of your data 1 time per month - AI Tokens for search and OpenAI with a limit of \$250 per month. Usage beyond this limit will incur additional fees.	\$ 25,000.00	0%	Annual fee for first LLM subscription
1. Software Licensing and Subscription Costs: Additional LLMs - Annual Licensing Fee LLM #2+:	Additional LLM Subscription(s) include: - Unlimited staff use - Auto indexing of your data 1 time per month - AI Tokens for search and OpenAI with a limit of \$250 per month. Usage beyond this limit will incur additional fees.	\$ 10,000.00	0%	Annual fee for each additional LLM Can be added later as needed. Cost to be prorated based on LLM #1 subscription dates. For budgeting only.
2. Implementation and Customization Costs: Madison AI Software / Custom LLM Development - Set Up Fee	Deployment includes: - Custom LLM setup and configuration including prompt fine-tuning - Up to 2 revisions to the AI Assistant prompts - Rollout & Training – 2-3 team training sessions, to be recorded for future use	\$ 10,000.00	50%	One-time fee; \$5,000 discount off the unit price for TX Share customers
3. Training and Support Costs: <i>Include costs for training government staff, technical support, and customer service, both during and after implementation.</i>	Included in the Set Up Fee			
4. Ongoing Maintenance and Updates: <i>Provide costs for ongoing software maintenance, updates, and any regular services required to keep the AI system running smoothly.</i>	Included in the Subscription Fee			
5. Optional Add-Ons or Features: <i>List any additional features or services available that are not included in the core proposal but can be added at an additional cost.</i>				
6. Total Cost of Ownership (TCO): <i>Summarize the Total Cost of Ownership (TCO), which includes all costs over a defined period (e.g., 3 years or 5 years). This should reflect software, implementation, support, maintenance, and optional add-ons.</i>		\$ 40,000.00		Annual cost for 2 LLMs reflecting 50% discount on Set Up Fee; additional LLMs above 2 will incur additional fees as noted.
7. Additional Costs (if applicable): Additional Token Usage	Suggested to scale utilization to 100 users. For budgeting purpose only.	\$ 3,000.00	0%	

Category 2 - Ancillary Goods and/or Services

Describe Below:		% Discount	Notes/Comments
NA			

7. HUB Bonus

From: State of Oregon (OCMS) <oregon4biz@diversitysoftware.com>
Sent: Tuesday, April 9, 2024 8:27 AM
To: Nancy Olsen <Nancy@onstrategyhq.com>
Subject: Oregon: Women Business Enterprise (WBE) Annual Review Confirmation



Nancy Olsen
M3 Planning, Inc. DBA DBA OnStrategy
527 Lander St
Reno, NV 89509

Re: Women Business Enterprise (WBE) Annual Review Confirmation
Oregon Certification No.: 6315

Ms. Olsen:

Congratulations! Your business continues to meet the state eligibility requirements criteria as established in the Oregon Revised Statutes (ORS 200.005-.075) and the Oregon Administrative Rules (OAR 123-200-1000 - 2300) and remains a COBID Certified firm in Oregon subject to all federal and state laws applicable to the transaction of business.

Continued certification is contingent upon annual reporting of personal and business income with a more thorough review of ongoing eligibility every third year. COBID will notify you in advance of your annual obligation to report.

You are required to notify COBID within 30 days of any if, at any time, there is a material change in your firm, including changes in ownership, control, operational management, address, or contact information. You must notify this office in writing within 30 days of the change. Submit a Change Request through our online certification management system (<https://oregon4biz.diversitysoftware.com>), via U.S. Mail, or by email to cobid.web@oregon.gov. Notification must include any supporting documentation. Failure to inform COBID of changes or failure to respond to requests for annual reporting information may result in decertification.

Your Company remains in the Directory of Certified Firms and publicly available at www.ORcobid.com. We recommend that you regularly view your firm's information in the Directory to confirm your contact information is current and that the description and NAICS/NIGP codes listed accurately describe your services and/or products. Your inclusion in our Directory is key to vendors and agencies identifying and confirming your certification in Oregon. As long as your firm remains in the Directory, you are certified. You will receive future notification regarding yearly reporting requirements. Your firm may continue to compete for and perform work on all USDOT federally funded projects throughout Oregon, receiving DBE credit in the following areas:

NAICS 541611: ADMINISTRATIVE MANAGEMENT AND GENERAL MANAGEMENT CONSULTING SERVICES
NAICS 541613: MARKETING CONSULTING SERVICES
NAICS 541618: OTHER MANAGEMENT CONSULTING SERVICES
NIGP 91806: ADMINISTRATIVE CONSULTING
NIGP 91876: MARKETING CONSULTING
NIGP 92040: PROGRAMMING SERVICES, COMPUTER, INCLUDING MOBILE DEVICE APPLICATIONS

If you have questions regarding your certification and the codes assigned; or if you do not have access to the internet, please contact our office and I can assist you.

Sincerely,

Daniel Jackson,
Certification Specialist II
Phone: 503-986-0075
Email: daniel.j.jackson@biz.oregon.gov

This message was sent to: nancy@onstrategyhq.com
Sent on: 4/9/2024 10:27:02 AM
System ReferenceID: 224940633

8. Required Attachments

See the following pages

**ATTACHMENT I: INSTRUCTIONS
FOR PROPOSALS COMPLIANCE AND SUBMITTAL**

Compliance with the Solicitation

Submissions must be in strict compliance with this solicitation. Failure to comply with all provisions of the solicitation may result in disqualification.

Compliance with the NCTCOG Standard Terms and Conditions

By signing its submission, Offeror acknowledges that it has read, understands and agrees to comply with the NCTCOG standard terms and conditions.

Acknowledgment of Insurance Requirements

By signing its submission, Offeror acknowledges that it has read and understands the insurance requirements for the submission. Offeror also understands that the evidence of required insurance must be submitted within ten (10) working days following notification of its offer being accepted; otherwise, NCTCOG may rescind its acceptance of the Offeror's proposals. The insurance requirements are outlined in Section 2.2 - General Terms and Conditions.

Name of Organization/Contractor(s):

M3 Planning, Inc. dba Madison AI

Signature of Authorized Representative:

Conni Armstrong

Date: 1/23/25

ATTACHMENT II: CERTIFICATIONS OF OFFEROR

I hereby certify that the information contained in this proposal and any attachments is true and correct and may be viewed as an accurate representation of proposed services to be provided by this organization. I certify that no employee, board member, or agent of the North Central Texas Council of Governments has assisted in the preparation of this proposal. I acknowledge that I have read and understand the requirements and provisions of the solicitation and that the organization will comply with the regulations and other applicable local, state, and federal regulations and directives in the implementation of this contract.

I also certify that I have read and understood all sections of this solicitation and will comply with all the terms and conditions as stated; and furthermore that I, Connie Armstrong (typed or printed name) certify that I am the Head of Client Operations (title) of the corporation, partnership, or sole proprietorship, or other eligible entity named as offeror and respondent herein and that I am legally authorized to sign this offer and to submit it to the North Central Texas Council of Governments, on behalf of said offeror by authority of its governing body.

Name of Organization/Contractor(s):

M3 Planning, Inc. dba Madison AI

Signature of Authorized Representative:

Connie Armstrong

Date: 1/23/25

**ATTACHMENT III: CERTIFICATION
REGARDING DEBARMENT, SUSPENSION AND OTHER RESPONSIBILITY MATTERS**

This certification is required by the Federal Regulations Implementing Executive Order 12549, Debarment and Suspension, 45 CFR Part 93, Government-wide Debarment and Suspension, for the Department of Agriculture (7 CFR Part 3017), Department of Labor (29 CFR Part 98), Department of Education (34 CFR Parts 85, 668, 682), Department of Health and Human Services (45 CFR Part 76).

The undersigned certifies, to the best of his or her knowledge and belief, that both it and its principals:

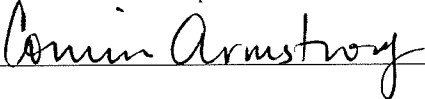
1. Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal department or agency;
2. Have not within a three-year period preceding this contract been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or Local) transaction or contract under a public transaction, violation of federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification, or destruction of records, making false Proposals, or receiving stolen property;
3. Are not presently indicated for or otherwise criminally or civilly charged by a government entity with commission of any of the offense enumerated in Paragraph (2) of this certification; and,
4. Have not within a three-year period preceding this contract had one or more public transactions terminated for cause or default.

Where the prospective recipient of federal assistance funds is unable to certify to any of the qualifications in this certification, such prospective recipient shall attach an explanation to this certification form.

Name of Organization/Contractor(s):

M3 Planning, Inc. dba Madison AI

Signature of Authorized Representative:



Date: 1/23/25

ATTACHMENT IV: RESTRICTIONS ON LOBBYING

Section 319 of Public Law 101-121 prohibits recipients of federal contracts, grants, and loans exceeding \$100,000 at any tier under a federal contract from using appropriated funds for lobbying the Executive or Legislative Branches of the federal government in connection with a specific contract, grant, or loan. Section 319 also requires each person who requests or receives a federal contract or grant in excess of \$100,000 to disclose lobbying.

No appropriated funds may be expended by the recipient of a federal contract, loan, or cooperative agreement to pay any person for influencing or attempting to influence an officer or employee of any federal executive department or agency as well as any independent regulatory commission or government corporation, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with any of the following covered federal actions: the awarding of any federal contract, the making of any federal grant, the making of any federal loan the entering into of any cooperative agreement and the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan, or cooperative agreement.

As a recipient of a federal grant exceeding \$100,000, NCTCOG requires its subcontractors of that grant to file a certification, set forth in Appendix B.1, that neither the agency nor its employees have made, or will make, any payment prohibited by the preceding paragraph.

Subcontractors are also required to file with NCTCOG a disclosure form, set forth in Appendix B.2, if the subcontractor or its employees have made or have agreed to make any payment using nonappropriated funds (to include profits from any federal action), which would be prohibited if paid for with appropriated funds.

**LOBBYING CERTIFICATION
FOR CONTRACTS, GRANTS, LOANS, AND COOPERATIVE AGREEMENTS**

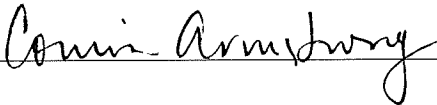
The undersigned certifies, to the best of his or her knowledge or belief, that:

1. No federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an officer or employee of a Member of Congress in connection with the awarding of any federal contract, the making of any federal loan, the entering into of any cooperative Contract, and the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan, or cooperative contract; and
2. If any funds other than federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this federal contract, grant, loan, and or cooperative contract, the undersigned shall complete and submit Standard Form – LLL, “Disclosure Form to Report Lobbying”, in accordance with the instructions.
3. The undersigned shall require that the language of this certification be included in the award documents for all sub-awards at all tiers and that all sub-recipients shall certify accordingly.

Name of Organization/Contractor(s):

M3 Planning, Inc. dba Madison AI

Signature of Authorized Representative:



Date: 1/23/25

ATTACHMENT V: DRUG-FREE WORKPLACE CERTIFICATION

The M3 Planning, Inc. dba Madison AI (company name) will provide a Drug Free Work Place in compliance with the Drug Free Work Place Act of 1988. The unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited on the premises of the M3 Planning, Inc. dba Madison AI (company name) or any of its facilities. Any employee who violates this prohibition will be subject to disciplinary action up to and including termination. All employees, as a condition of employment, will comply with this policy.

CERTIFICATION REGARDING DRUG-FREE WORKPLACE

This certification is required by the Federal Regulations Implementing Sections 5151-5160 of the Drug-Free Workplace Act, 41 U.S.C. 701, for the Department of Agriculture (7 CFR Part 3017), Department of Labor (29 CFR Part 98), Department of Education (34 CFR Parts 85, 668 and 682), Department of Health and Human Services (45 CFR Part 76).

The undersigned subcontractor certifies it will provide a drug-free workplace by:

Publishing a policy Proposal notifying employees that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the workplace and specifying the consequences of any such action by an employee;

Establishing an ongoing drug-free awareness program to inform employees of the dangers of drug abuse in the workplace, the subcontractor's policy of maintaining a drug-free workplace, the availability of counseling, rehabilitation and employee assistance programs, and the penalties that may be imposed on employees for drug violations in the workplace;

Providing each employee with a copy of the subcontractor's policy Proposal;

Notifying the employees in the subcontractor's policy Proposal that as a condition of employment under this subcontract, employees shall abide by the terms of the policy Proposal and notifying the subcontractor in writing within five days after any conviction for a violation by the employee of a criminal drug abuse statute in the workplace;

Notifying the Board within ten (10) days of the subcontractor's receipt of a notice of a conviction of any employee; and,

Taking appropriate personnel action against an employee convicted of violating a criminal drug statute or requires such employee to participate in a drug abuse assistance or rehabilitation program.

Name of Organization/Contractor(s):

M3 Planning, Inc. dba Madison AI

Signature of Authorized Representative:

Conin Armstrong

Date: 1/23/25

ATTACHMENT VI: DISCLOSURE OF CONFLICT OF INTEREST
CERTIFICATION REGARDING DISCLOSURE OF CONFLICT OF INTEREST

The undersigned certifies that, to the best of his or her knowledge or belief, that:

“No employee of the contractor, no member of the contractor’s governing board or body, and no person who exercises any functions or responsibilities in the review or approval of the undertaking or carrying out of this contract shall participate in any decision relating to this contract which affects his/her personal pecuniary interest.

Executives and employees of contractor shall be particularly aware of the varying degrees of influence that can be exerted by personal friends and associates and, in administering the contract, shall exercise due diligence to avoid situations which give rise to an assertion that favorable treatment is being granted to friends and associates. When it is in the public interest for the contractor to conduct business with a friend or associate of an executive or employee of the contractor, an elected official in the area or a member of the North Central Texas Council of Governments, a permanent record of the transaction shall be retained.

Any executive or employee of the contractor, an elected official in the area or a member of the NCTCOG, shall not solicit or accept money or any other consideration from a third person, for the performance of an act reimbursed in whole or part by contractor or Department. Supplies, tools, materials, equipment or services purchased with contract funds shall be used solely for purposes allowed under this contract. No member of the NCTCOG shall cast a vote on the provision of services by that member (or any organization which that member represents) or vote on any matter which would provide a direct or indirect financial benefit to the member or any business or organization which the member directly represents”.

No officer, employee or paid consultant of the contractor is a member of the NCTCOG.

No officer, manager or paid consultant of the contractor is married to a member of the NCTCOG.

No member of NCTCOG directly owns, controls or has interest in the contractor.

The contractor has disclosed any interest, fact, or circumstance that does or may present a potential conflict of interest.

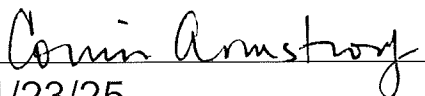
No member of the NCTCOG receives compensation from the contractor for lobbying activities as defined in Chapter 305 of the Texas Government Code.

Should the contractor fail to abide by the foregoing covenants and affirmations regarding conflict of interest, the contractor shall not be entitled to the recovery of any costs or expenses incurred in relation to the contract and shall immediately refund to the North Central Texas Council of Governments any fees or expenses that may have been paid under this contract and shall further be liable for any other costs incurred or damages sustained by the NCTCOG as it relates to this contract.

Name of Organization/Contractor(s):

M3 Planning, Inc. dba Madison AI

Signature of Authorized Representative:



Date: 1/23/25

CONFLICT OF INTEREST QUESTIONNAIRE

For vendor doing business with local governmental entity

FORM CIQ

This questionnaire reflects changes made to the law by H.B. 23, 84th Leg., Regular Session.

This questionnaire is being filed in accordance with Chapter 176, Local Government Code, by a vendor who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the vendor meets requirements under Section 176.006(a).

By law this questionnaire must be filed with the records administrator of the local governmental entity not later than the 7th business day after the date the vendor becomes aware of facts that require the statement to be filed. See Section 176.006(a-1), Local Government Code.

A vendor commits an offense if the vendor knowingly violates Section 176.006, Local Government Code. An offense under this section is a misdemeanor.

OFFICE USE ONLY

Date Received

1 Name of vendor who has a business relationship with local governmental entity.

N/A

2 ☐ Check this box if you are filing an update to a previously filed questionnaire. (The law requires that you file an updated completed questionnaire with the appropriate filing authority not later than the 7th business day after the date on which you became aware that the originally filed questionnaire was incomplete or inaccurate.)

3 Name of local government officer about whom the information is being disclosed.

Name of Officer

4 Describe each employment or other business relationship with the local government officer, or a family member of the officer, as described by Section 176.003(a)(2)(A). Also describe any family relationship with the local government officer. Complete subparts A and B for each employment or business relationship described. Attach additional pages to this Form CIQ as necessary.

A. Is the local government officer or a family member of the officer receiving or likely to receive taxable income, other than investment income, from the vendor?

☐

Yes

☐

No

B. Is the vendor receiving or likely to receive taxable income, other than investment income, from or at the direction of the local government officer or a family member of the officer AND the taxable income is not received from the local governmental entity?

☐

Yes

☐

No

5 Describe each employment or business relationship that the vendor named in Section 1 maintains with a corporation or other business entity with respect to which the local government officer serves as an officer or director, or holds an ownership interest of one percent or more.

6 ☐ Check this box if the vendor has given the local government officer or a family member of the officer one or more gifts as described in Section 176.003(a)(2)(B), excluding gifts described in Section 176.003(a-1).

7

Signature of vendor doing business with the governmental entity

Date

CONFLICT OF INTEREST QUESTIONNAIRE
For vendor doing business with local governmental entity

A complete copy of Chapter 176 of the Local Government Code may be found at <http://www.statutes.legis.state.tx.us/Docs/LG/htm/LG.176.htm>. For easy reference, below are some of the sections cited on this form.

Local Government Code § 176.001(1-a): "Business relationship" means a connection between two or more parties based on commercial activity of one of the parties. The term does not include a connection based on:

- (A) a transaction that is subject to rate or fee regulation by a federal, state, or local governmental entity or an agency of a federal, state, or local governmental entity;
- (B) a transaction conducted at a price and subject to terms available to the public; or
- (C) a purchase or lease of goods or services from a person that is chartered by a state or federal agency and that is subject to regular examination by, and reporting to, that agency.

Local Government Code § 176.003(a)(2)(A) and (B):

(a) A local government officer shall file a conflicts disclosure statement with respect to a vendor if:

(2) the vendor:

(A) has an employment or other business relationship with the local government officer or a family member of the officer that results in the officer or family member receiving taxable income, other than investment income, that exceeds \$2,500 during the 12-month period preceding the date that the officer becomes aware that

- (i) a contract between the local governmental entity and vendor has been executed; or
- (ii) the local governmental entity is considering entering into a contract with the vendor;

(B) has given to the local government officer or a family member of the officer one or more gifts that have an aggregate value of more than \$100 in the 12-month period preceding the date the officer becomes aware that:

- (i) a contract between the local governmental entity and vendor has been executed; or
- (ii) the local governmental entity is considering entering into a contract with the vendor.

Local Government Code § 176.006(a) and (a-1)

(a) A vendor shall file a completed conflict of interest questionnaire if the vendor has a business relationship with a local governmental entity and:

- (1) has an employment or other business relationship with a local government officer of that local governmental entity, or a family member of the officer, described by Section 176.003(a)(2)(A);
- (2) has given a local government officer of that local governmental entity, or a family member of the officer, one or more gifts with the aggregate value specified by Section 176.003(a)(2)(B), excluding any gift described by Section 176.003(a-1); or
- (3) has a family relationship with a local government officer of that local governmental entity.

(a-1) The completed conflict of interest questionnaire must be filed with the appropriate records administrator not later than the seventh business day after the later of:

(1) the date that the vendor:

- (A) begins discussions or negotiations to enter into a contract with the local governmental entity; or
- (B) submits to the local governmental entity an application, response to a request for proposals or bids, correspondence, or another writing related to a potential contract with the local governmental entity; or

(2) the date the vendor becomes aware:

- (A) of an employment or other business relationship with a local government officer, or a family member of the officer, described by Subsection (a);
- (B) that the vendor has given one or more gifts described by Subsection (a); or
- (C) of a family relationship with a local government officer.

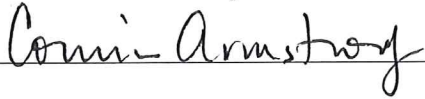
ATTACHMENT VII: CERTIFICATION OF FAIR BUSINESS PRACTICES

That the submitter has not been found guilty of unfair business practices in a judicial or state agency administrative proceeding during the preceding year. The submitter further affirms that no officer of the submitter has served as an officer of any company found guilty of unfair business practices in a judicial or state agency administrative during the preceding year.

Name of Organization/Contractor(s):

M3 Planning, Inc. dba Madison AI

Signature of Authorized Representative:



Date: 1/23/25

**ATTACHMENT VIII: CERTIFICATION OF GOOD STANDING
TEXAS CORPORATE FRANCHISE TAX CERTIFICATION**

Pursuant to Article 2.45, Texas Business Corporation Act, state agencies may not contract with for profit corporations that are delinquent in making state franchise tax payments. The following certification that the corporation entering into this offer is current in its franchise taxes must be signed by the individual authorized on Form 2031, Corporate Board of Directors Resolution, to sign the contract for the corporation.

The undersigned authorized representative of the corporation making the offer herein certified that the following indicated Proposal is true and correct and that the undersigned understands that making a false Proposal is a material breach of contract and is grounds for contract cancellation.

Indicate the certification that applies to your corporation:

☐

The Corporation is a for-profit corporation and certifies that it is not delinquent in its franchise tax payments to the State of Texas.

☒

The Corporation is a non-profit corporation or is otherwise not subject to payment of franchise taxes to the State of Texas.

Type of Business (if not corporation):

☐

Sole Proprietor

☐

Partnership

☐

Other

Pursuant to Article 2.45, Texas Business Corporation Act, the North Central Texas Council of Governments reserves the right to request information regarding state franchise tax payments.

M3 Planning, Inc. dba Madison AI

(Printed/Typed Name and Title of Authorized Representative)

Conin Armstrong

Signature

Date: 1/23/25

**ATTACHMENT IX: HISTORICALLY UNDERUTILIZED BUSINESSES,
MINORITY OR WOMEN-OWNED OR DISADVANTAGED BUSINESS ENTERPRISES**

Historically Underutilized Businesses (HUBs), minority or women-owned or disadvantaged businesses enterprises (M/W/DBE) are encouraged to participate in the solicitation process.

NCTCOG recognizes the certifications of most agencies. HUB vendors must submit a copy of their certification for consideration during the evaluation of their proposal. Please attach the copy to this form. This applies only to the Offeror and not a subcontractor.

Texas vendors who are not currently certified are encouraged to contact either the Texas United Certification Program, State of Texas HUB Program, or the North Central Texas Regional Certification Agency, among others. Contact:

State of Texas HUB Program
Texas Comptroller of Public Accounts
Lyndon B. Johnson State Office Building
111 East 17th Street
Austin, Texas 78774
(512) 463-6958
<http://www.window.state.tx.us/procurement/prog/hub/>

North Central Texas Regional Certification Agency
624 Six Flags Drive, Suite 100
Arlington, TX 76011
(817) 640-0606
<http://www.nctrca.org/certification.html>

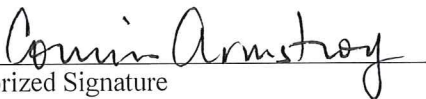
Texas United Certification Program
USDOT website at
<https://www.transportation.gov/DBE>

You must include a copy of your certification document as part of this solicitation to receive points in the evaluation.

Vendor to Sign Below to Attest to Validity of Certification:

M3 Planning, Inc. dba Madison AI

Vendor Name


Authorized Signature

Connie Armstrong

Typed Name

1/23/25

Date

☐ Not applicable.

**ATTACHMENT X: NCTCOG FEDERAL AND STATE OF TEXAS
REQUIRED PROCUREMENT PROVISIONS**

The following provisions are mandated by Federal and/or State of Texas law. Failure to certify to the following will result in disqualification of consideration for contract. Entities or agencies that are not able to comply with the following will be ineligible for consideration of contract award.

**PROHIBITED TELECOMMUNICATIONS AND VIDEO SURVEILLANCE SERVICES OR EQUIPMENT
CERTIFICATION**

This Contract is subject to the Public Law 115-232, Section 889, and 2 Code of Federal Regulations (CFR) Part 200, including §200.216 and §200.471, for prohibition on certain telecommunications and video surveillance or equipment. Public Law 115-232, Section 889, identifies that restricted telecommunications and video surveillance equipment or services (e.g., phones, internet, video surveillance, cloud servers) include the following:

- A) Telecommunications equipment that is produced by Huawei Technologies Company or ZTE Corporation (or any subsidiary or affiliates of such entities).
- B) Video surveillance and telecommunications equipment produced by Hytera Communications Corporations, Hangzhou Hikvision Digital Technology Company, or Dahua Technology Company (or any subsidiary or affiliates of such entities).
- C) Telecommunications or video surveillance services used by such entities or using such equipment.
- D) Telecommunications or video surveillance equipment or services produced or provided by an entity that the Secretary of Defense, Director of the National Intelligence, or the Director of the Federal Bureau of Investigation reasonably believes to be an entity owned or controlled by the government of a covered foreign country. The entity identified below, through its authorized representative, hereby certifies that no funds under this Contract will be obligated or expended to procure or obtain telecommunication or video surveillance services or equipment or systems that use covered telecommunications equipment or services as a substantial or essential component of any system, or as a critical technology as part of any system prohibited by 2 CFR §200.216 and §200.471, or applicable provisions in Public Law 115-232 Section 889.

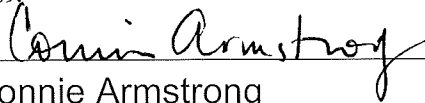
☒ The Contractor or Subrecipient hereby certifies that it does comply with the requirements of 2 CFR §200.216 and §200.471, or applicable regulations in Public Law 115-232 Section 889.

SIGNATURE OF AUTHORIZED PERSON:

NAME OF AUTHORIZED PERSON:

NAME OF COMPANY:

DATE:



Connie Armstrong

M3 Planning, Inc. dba Madison AI

1/23/25

-OR-

☐ The Contractor or Subrecipient hereby certifies that it cannot comply with the requirements of 2 CFR §200.216 and §200.471, or applicable regulations in Public Law 115-232 Section 889.

SIGNATURE OF AUTHORIZED PERSON:

NAME OF AUTHORIZED PERSON:

NAME OF COMPANY:

DATE:

DISCRIMINATION AGAINST FIREARMS ENTITIES OR FIREARMS TRADE ASSOCIATIONS

This contract is subject to the Texas Local Government Code chapter 2274, Subtitle F, Title 10, prohibiting contracts with companies who discriminate against firearm and ammunition industries. TLGC chapter 2274, Subtitle F, Title 10, identifies that "discrimination against a firearm entity or firearm trade association" includes the following:

- A) means, with respect to the entity or association, to:
- I. refuse to engage in the trade of any goods or services with the entity or association based solely on its status as a firearm entity or firearm trade association; and
 - II. refrain from continuing an existing business relationship with the entity or association based solely on its status as a firearm entity or firearm trade association; or
 - III. terminate an existing business relationship with the entity or association based solely on its status as a firearm entity or firearm trade association.
- B) An exception to this provision excludes the following:
- I. contracts with a sole-source provider; or
 - II. the government entity does not receive bids from companies who can provide written verification.

The entity identified below, through its authorized representative, hereby certifies that they have no practice, policy, guidance, or directive that discriminates against a firearm entity or firearm trade association; and that they will not discriminate during the term of the contract against a firearm entity or firearm trade association as prohibited by Chapter 2274, Subtitle F, Title 10 of the Texas Local Government Code.

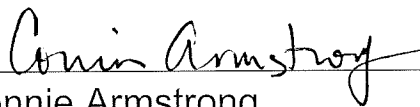
☒ The Contractor or Subrecipient hereby certifies that it does comply with the requirements of Chapter 2274, Subtitle F, Title 10.

SIGNATURE OF AUTHORIZED
PERSON:

NAME OF AUTHORIZED PERSON:

NAME OF COMPANY:

DATE:



Connie Armstrong

M3 Planning, Inc. dba Madison AI

1/23/25

-OR-

☐ The Contractor or Subrecipient hereby certifies that it cannot comply with the requirements of Chapter 2274, Subtitle F, Title 10.

SIGNATURE OF AUTHORIZED
PERSON:

NAME OF AUTHORIZED PERSON:

NAME OF COMPANY:

DATE:

BOYCOTTING OF CERTAIN ENERGY COMPANIES

This contract is subject to the Texas Local Government Code chapter 809, Subtitle A, Title 8, prohibiting contracts with companies who boycott certain energy companies.

TLGC chapter Code chapter 809, Subtitle A, Title 8, identifies that "boycott energy company" means, without an ordinary business purpose, refusing to deal with, terminating business activities with, or otherwise taking any action that is intended to penalize, inflict economic harm on, or limit commercial relations with a company because the company:

- I. engages in the exploration, production, utilization, transportation, sale, or manufacturing of fossil fuel-based energy and does not commit or pledge to meet environmental standards beyond applicable federal and state law; and
- II. does business with a company described by paragraph (I).

The entity identified below, through its authorized representative, hereby certifies that they do not boycott energy companies, and that they will not boycott energy companies during the term of the contract as prohibited by Chapter 809, Subtitle A, Title 8 of the Texas Local Government Code.

☒ The Contractor or Subrecipient hereby certifies that it does comply with the requirements of Chapter 809, Subtitle A, Title 8.

SIGNATURE OF AUTHORIZED PERSON:

NAME OF AUTHORIZED PERSON:

NAME OF COMPANY:

DATE:

Connie Armstrong
Connie Armstrong
M3 Planning, Inc. dba Madison AI
1/23/25

-OR-

☐ The Contractor or Subrecipient hereby certifies that it cannot comply with the requirements of Chapter 809, Subtitle A, Title 8.

SIGNATURE OF AUTHORIZED PERSON:

NAME OF AUTHORIZED PERSON:

NAME OF COMPANY:

DATE:

EXHIBIT 1: CATEGORIES OFFERED AND PRICING PROPOSAL

Place a checkmark next to each category you are offering in your proposal:

- ☒ Service Category #1: Artificial Intelligence (AI) Solutions for Public Sector Entities
- ☐ Service Category #2: Other Ancillary Goods or Services (List Below)

The Respondent shall furnish a comprehensive cost pricing model for this RFP, pursuant to the guidance provided in Section 5.13. Please delineate pricing based on **Service Category 1**, **Service Category 2**, or a combined pricing model for both categories. Label your pricing proposal as “Exhibit 1 – Pricing,” and use as many pages as necessary to provide detailed information.

Important Note: This RFP is not tied to any specific project at this time. The purpose is to secure pricing for potential future use of AI solutions by public sector entities. Respondents are encouraged to provide pricing models that are as descriptive and flexible as possible to accommodate the varied needs of potential users.

In addition to the requested pricing, Respondents are encouraged to include a retainage rate based on the hourly rate of each staff member for any future projects that may arise but are not currently anticipated by this RFP.

Refer to Exhibit 1 –Pricing Proposal Worksheet Attachment.

EXHIBIT 2: SAMPLE MARKET BASKET FORM

This Exhibit is not applicable for this solicitation.

EXHIBIT 3: SERVICE DESIGNATION AREAS

	Texas Service Area Designation or Identification		
Proposing Firm Name:	M3 Planning, Inc. dba Madison AI		
Notes:	Indicate in the appropriate box whether you are proposing to service the entire state of Texas		
	Will service the entire state of Texas	Will not service the entire state of Texas	
	<input checked="checked" type="checkbox"/>	<input type="checkbox"/>	
	If you are not proposing to service the entire state of Texas, designate on the form below the regions that you are proposing to provide goods and/or services to. By designating a region or regions, you are certifying that you are willing and able to provide the proposed goods and services.		
Item	Region	Metropolitan Statistical Areas	Designated Service Area
1.	North Central Texas	16 counties in the Dallas-Fort Worth Metropolitan area	
2.	High Plains	Amarillo Lubbock	
3.	Northwest	Abilene Wichita Falls	
4.	Upper East	Longview Texarkana, TX-AR Metro Area Tyler	
5.	Southeast	Beaumont-Port Arthur	
6.	Gulf Coast	Houston-The Woodlands- Sugar Land	
7.	Central Texas	College Station-Bryan Killeen-Temple Waco	
8.	Capital Texas	Austin-Round Rock	
9.	Alamo	San Antonio-New Braunfels Victoria	
10.	South Texas	Brownsville-Harlingen Corpus Christi Laredo McAllen-Edinburg-Mission	
11.	West Texas	Midland Odessa San Angelo	
12.	Upper Rio Grande	El Paso	

(Exhibit 3 continued on next page)

Nationwide Service Area Designation or Identification Form			
Proposing Firm Name:		M3 Planning, Inc. dba Madison AI	
Notes:		Indicate in the appropriate box whether you are proposing to provide service to all Fifty (50) States.	
		Will service all fifty (50) states <input checked="checked" type="checkbox"/>	Will not service fifty (50) states <input type="checkbox"/>
		If you are not proposing to service to all fifty (50) states, then designate on the form below the states that you will provide service to. By designating a state or states, you are certifying that you are willing and able to provide the proposed goods and services in those states.	
		If you are only proposing to service a specific region, metropolitan statistical area (MSA), or City in a State, then indicate as such in the appropriate column box.	
Item	State	Region/MSA/City (write "ALL" if proposing to service entire state)	Designated as a Service Area
1.	Alabama		
2.	Alaska		
3.	Arizona		
4.	Arkansas		
5.	California		
6.	Colorado		
7.	Connecticut		
8.	Delaware		
9.	Florida		
10.	Georgia		
11.	Hawaii		
12.	Idaho		
13.	Illinois		
14.	Indiana		
15.	Iowa		
16.	Kansas		
17.	Kentucky		
18.	Louisiana		
19.	Maine		
20.	Maryland		

21.	Massachusetts		
22.	Michigan		
23.	Minnesota		
24.	Mississippi		
25.	Missouri		
26.	Montana		
27.	Nebraska		
28.	Nevada		
29.	New Hampshire		
30.	New Jersey		
31.	New Mexico		
32.	New York		
33.	North Carolina		
34.	North Dakota		
35.	Ohio		
36.	Oregon		
37.	Oklahoma		
38.	Pennsylvania		
39.	Rhode Island		
40.	South Carolina		
41.	South Dakota		
42.	Tennessee		
43.	Texas		
44.	Utah		
45.	Vermont		
46.	Virginia		
47.	Washington		
48.	West Virginia		
49.	Wisconsin		
50.	Wyoming		

End of Exhibit 3