National NeighborWorks Association & Sourcing Alliance

Delivering Additional Member Benefits to You

August 16, 2018

 National NeighborWorks® Association **+** **Sourcing**Alliance — Design Procure Comply Manage

Discussion Points

- Welcome & Introductions

- Who is Sourcing Alliance?

- Purpose of the NNWA & Sourcing Alliance Partnership

- Newly Available NNWA Member Benefit Programs

- Getting Started

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Sourcing Alliance's Purpose is Simple...

To enable you to more effectively fulfill your purpose.

How?

By leveraging group purchasing and procurement expertise to save you time and money, unleashing financial and human capital to reinvest in providing the best possible service to your constituents, customers, and stakeholders.

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Who is Sourcing Alliance?

- Sourcing Alliance is a Public Sector Group Purchasing Organization (**GPO**).

- We establish "piggybackable" supplier contracts with improved pricing and contract terms for a wide range of product and service spending categories.

- Public, private, and not-for-profit organizations join Sourcing Alliance to leverage any of these group purchasing programs.

- Association partners offer Sourcing Alliance group purchasing programs as additional member benefits.

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Two Types of Contracts

Compliant Contracts

- Contracts explicitly established under public sector procurement guidelines. Public sector and federally funded organizations may leverage these cooperative contracts entities without having to conduct a bid/RFP process.

Negotiated Agreements

- Contracts established through an intensive vendor selection and vetting process that is more in keeping with the typical private business and non-profit organization procurement process.

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OMB Procurement Guidelines

The Super Circular Section 200.318 General Procurement Standards paragraphs (d), (e), and (f) require that a non-Federal entity's procurement procedures avoid duplicative purchases and encourage non-Federal entities to enter into inter-entity agreements for shared goods and services, such as the agreements that Sourcing Alliance has established with its Supplier Partners:

§ 200.318 General procurement standards.

(e) To foster greater economy and efficiency, and in accordance with efforts to promote cost-effective use of shared services across the Federal government, the non-Federal entity is encouraged to enter into state and local intergovernmental agreements or interentity agreements where appropriate for procurement or use of common or shared goods and services.

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The NNWA & Sourcing Alliance Partnership

- Initially formed in 2011 under Dave Brown
- Partnership objectives for NNWA:
  - **R**elevance
    - Expands portfolio of member benefits.
    - Deliver better pricing and terms & conditions.
  - **R**etention
    - Increases the value of your membership.
  - **R**evenue
    - Generates non-dues revenue for the association partner
- Re-launching partnership in 2018

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Program Name

PROGRAM SUMMARY

A short narrative describing the intent and value of the program.

FEATURES & BENEFITS

A listing of the top 4-7 features and benefits of the program from the buyer's perspective.

GETTING STARTED

- Review your existing situation, including:
  - Who is your supplier(s)?
  - What are your contract terms?
  - How much do you spend each year?
- Identify what is working, what is not working, what is missing for you today.

ADDITIONAL INFORMATION

A summary of program-specific requirements, geographic coverage, and other relevant information.

Office Supplies

Sourcing Alliance's Office Supplies Program is a comprehensive program that addresses recurring office supplies acquisition challenges. From high costs and inconsistent pricing to time spent buying from multiple vendors, these challenges often prevent efficient purchasing and effective management of total office supplies spend. Our program delivers savings from 10 to 30% on office supplies, off-site printing, furniture, technology items, breakroom products, janitorial supplies, and promotional items, all from a single proven supplier.

FEATURES & BENEFITS

- Aggressive Pricing – aggressive pricing on a core list of approximately 1,100 items and the flexibility to establish customized local lists for each member with unlimited number of items.

- Annual Rebate Program – annual rebates, with the rebate percentage increasing as the total combined spend of all Sourcing Alliance participants increases.

- Free Delivery – no delivery charges for catalog items and no minimum order sizes.

- A Comprehensive Program – includes office supplies, toner, paper, off-site printing, furniture, technology, break room, janitorial supplies, promotional items, and eco-friendly options.

- Employee Purchasing Program –extend the organization's pricing to its employees for personal purchases.

GETTING STARTED

- Understand your current situation (what's working, not working, missing?)
- Who is your current vendor(s)? What is your annual office supplies spend?
- Are you under contract? If so, what are the terms and expiration date?
- How are you buying today (online, in-store, etc.)
- Provide copies of invoices in Excel format

ADDITIONAL INFORMATION

- Nationwide coverage
- No minimum requirements

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Audio/Visual Equipment

B&H Photo is one of the nation's largest distributors of security, IT, multimedia, optics, and audio/visual presentation technology, with over 250,000 products representing 1,500 brands. B&H has served business-to-business customers for over 30 years, providing a team of experienced professionals to support order processing, customer service, unique requests, technical advice, and planning solutions.

FEATURES & BENEFITS

- A personal Account Team for order processing, customer service, and unique requests.
- Largest selection with over 250,000 products and 1,500 brands to choose from; unrivaled in-stock inventory enabling quick delivery.

- State of the art warehouses, efficient order processing, and real time tracking, all to assure quick delivery to multiple campus locations.
- Various payment options including, University "P" (credit) Cards, Purchase Orders, Leasing, Wire Transfers, etc.

GETTING STARTED

- Understand your current situation (what's working, not working, missing?)
- Who is your current vendor(s)? What is your annual A/V equipment spend?
- Are you under contract? If so, what are the terms and what is the expiration date?
- How are you buying today (online, in-store, etc.)
- Provide copies of invoices in Excel format

ADDITIONAL INFORMATION

- Nationwide coverage
- No minimum requirements

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Grant Management Software

The Sourcing Alliance Grant Management Software Program provides you with an end-to-end grant management solution for both grantors and grantees. StreamLink Software's online grant management product, AmpliFund, allows your organization to standardize complex tasks, increase efficiency, ensure compliance with federal funding requirements, and secure additional revenue.

FEATURES & BENEFITS

- Delivers a proven, flexible and configurable system interface for grantees and grantors.
- Provides reliable, secure, and auditable system.
- Offers detailed reporting capabilities to include annual activity reports and date-specific activity reports through the grant application, scoring, award, and management lifecycle.

- Provides ability to import all existing grant-related data from word processing and spreadsheet files into AmpliFund.
- Is available and accessible to users 24/7 from any Internet-connected device.
- Requires little-to-no staff time to maintain, repair, or upgrade software because AmpliFund is a hosted in the cloud.

GETTING STARTED

- Understand your current situation (what's working, not working, missing?)
- Are you a grantor, grantee, or both?
- What is the number and dollar value of grants you administer annually?

ADDITIONAL INFORMATION

- Nationwide coverage
- No minimum requirements

Credit Card Processing/ Merchant Services

Our Merchant Services Program begins with a complete analysis of your current methodology for processing payments and develops strategic recommendations to handle your credit card processing and check payments. The program includes state of the art credit card readers at no cost and ensures payment card industry compliance for data security. In addition, you get, i) access to USPay's custom-built online gateway for payment processing across multiple locations with multiple user-permission levels, ii) the ability to set up payment plans for outstanding balances, iii) online billing and bill pay functionality, and iv) the capability to email receipts to customers.

FEATURES & BENEFITS

- Initial Analysis - a complete analysis of your current payment processing methodology.
- Strategic Plan - the development and implementation of a custom strategic plan to manage your credit card and check payment processes in the most cost-effective way.
- Equipment - state-of-the-art credit card readers at no cost.
- Compliance - PCI compliance.

- Online Gateway - an online gateway that delivers fast transaction processing across multiple locations with multiple user-permission levels.
- Online billing and bill pay.
- Payment Plans – the ability to set up payment plans for outstanding balances.
- Email Receipts – the capability to email receipts to customers.

GETTING STARTED

- Understand your current situation (what's working, not working, missing?)
- How do you accept payments today?
- What are the annual # of transactions and dollar volume processed?
- Who is your current vendor(s)?
- What is your contract expiration date?

ADDITIONAL INFORMATION

- Nationwide coverage
- No minimum requirements

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Background Checks & Employee Screening

Sterling Talent Solutions

Sterling Talent Solutions offers high quality employment screening and hiring solutions. Sterling uses its pioneering CourtDirect™ technology, which provides instant access to criminal records across 2,200 county court jurisdictions in the United States, enabling Sterling to search over 75% of all criminal records in just minutes. It delivers faster turnaround times on screening request and improves the overall accuracy by decreasing the opportunity for human error.

FEATURES & BENEFITS

- Employment Background Checks
- Criminal Background Checks
- Drug and Health Screening
- Education & Employment Verification
- Executive Investigations
- Social Security Number Trace

- Motor Vehicle Records Checks
- Sanctions, Risk & Compliance
- I-9 & New Hire Smart Forms Solutions
- Employee Audits & Monitoring
- Form I-9 & E-verify
- Hiring Tax Credits

GETTING STARTED

- Understand your current situation (what's working, not working, missing?)
- How many background screenings do you conduct each year?
- What types of screenings do you conduct (e.g., criminal, drugs)?
- Who is your current vendor(s)? What is your annual spend?
- Are you under contract? If so, what are the terms and the expiration date?

ADDITIONAL INFORMATION

- Nationwide coverage
- No minimum requirements

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Payroll & Accounting Software

PATRIOT SOFTWARE

Sourcing Alliance partnered with Patriot Software to provide fast, simple, and reliable payroll and accounting software. Patriot Software provides all the features and functions that a small operation needs, at a lower price. With first-hand experience in tackling the challenges that operators face, Patriot helps small organizations keep their time and money.

FEATURES & BENEFITS

- Easy to Use – small business owners can learn to use the software in minutes! No formal training is required. Free USA-based support is just a phone call away (toll-free).

- Very Inexpensive – software is priced for the smallest of small businesses. There are no hidden fees. No long-term contracts. No penalties. No hassles.

- Safe, Secure, and Accurate – Patriot servers are in a secure data center protected by redundant firewalls and sophisticated encryption techniques. We are tested, audited, and bonded, and we guarantee our accuracy for our accounting and payroll calculations.

GETTING STARTED

- Understand your current situation (what's working, not working, missing?)
- How many employees does your organization have?
- Do you insource or outsource payroll processing today?
- Who is your current vendor(s)? What is your annual payroll processing spend?
- Are you under contract? If so, what are the terms and what is the expiration date?

ADDITIONAL INFORMATION

- Nationwide coverage
- No minimum requirements

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Contract & Supplier Management Software

ProcureSafe
bringing buyers and suppliers together

Sourcing Alliance's Contract and Supplier Management Program offers a cloud-based system that allows you to store, monitor, and manage all contract and supplier related data in a central repository. Through this system, you can set alerts for contract expirations, track contract obligations, build supplier records, access hundreds of pre-qualified suppliers, and even qualify prospective suppliers quickly and efficiently. The program allows you to do away with the stress and rigor of manual processes and to save a great deal of time, money, and resources through our automated contract and supplier management system.

FEATURES & BENEFITS

- Build and maintain accurate supplier records in a centralized database.

- Solicit bids from the thousands of pre-qualified, fully-vetted, and approved suppliers in the ProcureSafe database.

- Leverage ProcureSafe's bid automation capabilities to streamline your procurement process.

- Stop fielding supplier sales calls by directing prospective suppliers to a supplier registration process linked on your organization's website.

GETTING STARTED

- Understand your current situation (what's working, not working, missing?)
- How many 3rd party contracts do you have? Do you have a central contract repository?
- How many supplier relationships to you manage today?

ADDITIONAL INFORMATION

- Nationwide coverage
- No minimum requirements

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Identity Theft Protection

LifeLock®
BENEFIT SOLUTIONS

The Sourcing Alliance Identity Theft Protection Program offers you the option of providing your employees with five points of protection including identity monitoring, scanning for threats with patented technology, responding to identity theft, LifeLock's $1 million service guarantee, and credit score tracking. At no cost to you, your employees receive a 15% discount from LifeLock's retail rates when purchasing through payroll deduction even if they are already LifeLock customers. You can make this program available as a paid of voluntary benefit.

FEATURES & BENEFITS

- On average, 15% to 20% of employees opt-in for this program (vs. 1% to 5% for traditional voluntary employee benefits).

- Employees receive a 15% discount from LifeLock's retail rates when purchasing LifeLock through payroll deduction.

- Employees who are current LifeLock customers also receive this improved pricing.

- Our team provides the necessary materials and training to educate your employees about the offering prior to your annual benefits enrollment process.

- Sourcing Alliance will either a) provide the content needed within your existing online benefits enrollment process, or b) provide a stand-alone, branded registration portal for your organization.

GETTING STARTED

- Do you offer voluntary benefits today? If so, understand your current situation (what's working, not working, missing)?
- How many employees do you have?
- Is payroll auto deduct a viable option?
- When is your annual enrollment process?

ADDITIONAL INFORMATION

- Nationwide coverage
- No minimum requirements
- Payroll auto deduct preferable

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Managed Print Services

ComDoc
A Xerox Company

The Sourcing Alliance Managed Print Service Program integrates all costs associated with in-house copying and printing, including hardware, software, installation, management, maintenance, service, and toner. At no cost and with no obligation, our program provides a complete assessment of your culture, usage, existing and desired workflows, current costs, and sustainability objectives in order to achieve a data-driven, custom solution that optimizes your workflow, reduces costs, and allows flexibility in your managed print services choices. Through its parent company, Xerox, Global Imaging Systems provides a full range of the highest quality equipment, including multi-functional devices, printers, production machines, and certified pre-owned alternatives.

FEATURES & BENEFITS

- 360 Analysis - a complete assessment of each member's current copier and printer capabilities, culture, usage, existing and desired workflows, current costs, and sustainability objectives.

- Highest quality equipment – including multi-functional devices, printers, production machines, and certified pre-owned alternatives.

- No Third-Party Contractors - all services performed with in-house employees.

- Single Contract, Single Bill - migrate all copy, print, scan, and fax equipment, software, and services to a single contract with a single bill each month.

- Extensive Software Solutions - further leverage your investment in office equipment to reduce manual processes and/or deliver new capabilities with extensive software solutions such as document management.

GETTING STARTED

- Understand your current situation (what's working, not working, missing?)
- Who is your current vendor(s)?
- What is your contract expiration date?
- Do you insource or outsource management of desktop printers?
- What are your current monthly/annual costs?

ADDITIONAL INFORMATION

- Near-nationwide coverage
- No minimum requirements

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Janitorial/Sanitation Supplies

The Sourcing Alliance Janitorial Sanitation Program provides high-quality, cost-effective, cleaning and maintenance products, including green solutions that reduce health and environmental risks. The program covers both institutional and industrial cleaning and maintenance needs across a variety of industries.

FEATURES & BENEFITS

- A holistic approach to your chemical and Janitorial/Sanitation supply
- A full line of Certified Green Products
- Complete facility survey provided at no cost

- Installation, training, and superior service and support
- Sector-specific programs that address specific needs and requirements

GETTING STARTED

- Understand your current situation (what's working, not working, missing?)
- Who is your current vendor(s)? What is your annual jan/san supplies spend?
- Are you under contract? If so, what are the terms and what is the expiration date?
- How are you buying today (online, in-store, etc.)
- Provide copies of invoices in Excel format

ADDITIONAL INFORMATION

- Nationwide coverage
- No minimum requirements

COMPLIANT

Janitorial Services

MARSDEN SERVICES

Sourcing Alliance recognizes that consistency, quality cleans, and low turnover rates are critical to the health and satisfaction of employees and visitors. The Janitorial Services Program offers you one contract vehicle for a full line of janitorial and related services, a full disclosure pricing model, and powerful technology-based management tools all through a single, reliable partner. These services include, but are not limited to, office and general cleaning, carpet and hard floor maintenance, preventive maintenance, window cleaning, special services such as pressure washing and event cleanup, recycling, and tile and grout restoration.

FEATURES & BENEFITS

- A Full Disclosure Pricing Model – line item pricing and detailed listing of services provided for the cost. This transparency provides members with the ability to balance competing budget limitations and desired cleaning quality.

- Consistency – a proven process to identify, hire, train, and manage the right employees to achieve consistent service delivery and low turnover. Marsden's turnover rate is 80% below the industry average, and Marsden delivers higher quality, more consistent cleans as a result.

- Innovative & Effective Quality Controls – custom-designed software technology to track and manage cleans, inspections, and problem resolution. Customers have full access to monitor cleaning services in real time.

- Proven Implementation Process – dedicated team of implementation specialists and a commitment to retain existing cleaners as requested by the customer.

- Complete Line of Janitorial & Related Services – office and general cleaning, floor maintenance, special services window cleaning, lab and medical cleaning, and more.

GETTING STARTED

- Understand your current situation (what's working, not working, missing?)
- Do you insource or outsource your janitorial services today? Who is your current vendor(s)?
- When does your current contract(s) expire? What is your annual janitorial services spend?
- How many facilities do you operate? What is the total square footage?
- Do you have any unique requirements (e.g., lab space, food preparation or serving areas)?

ADDITIONAL INFORMATION

- Near-nationwide coverage
- 100,000 sf or located in a major metro area

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COMPLIANT

Energy Procurement & Demand Management

The Sourcing Alliance Energy Procurement & Management Program provides a customized approach to managing the procurement of electricity and natural gas. Kinect's methodology completes the procurement process on your behalf. Kinect begins by analyzing your current energy usage and requirements and develops multiple strategic alternatives based on your objectives. Kinect then secures proposals from as many as 30 pre-qualified electricity and natural gas suppliers, evaluates the initial pricing and terms of each proposal, and engages in multiple rounds of additional pricing negotiations and contract concessions to achieve the best solution for you.

FEATURES & BENEFITS

- Custom-Designed Solutions – a comprehensive approach to analyze a client's energy consumption patterns and financial and strategic objectives as the basis for developing the optimal solution design for that client.

- Rigorous Procurement Process – a proven procurement process that begins with soliciting bids from multiple supplier s, continues with extensive negotiations and re-pricing, and concludes when Kinect has achieved the lowest possible price and best available contract terms.

- Compliance – procurement of electricity and natural gas contracts for public sector entities in accordance with statutory procurement guidelines.

- Enormous Buying Power – over 15 billion kWh and Mcf.

- Robust Portfolio of Services – offers both electricity and natural gas procurement management services, tariff analyses, load shape analyses, shadow meter testing, energy bill audit services, sales tax proration services, energy budget forecasting, thermal imaging services, power quality analysis/correction, demand response, and energy and peak demand reduction.

GETTING STARTED

- Understand your current situation (what's working, not working, missing?)
- Who are your current electricity and natural gas provider(s)?
- What is your annual spend on electricity and natural gas? How many facilities do you operate?
- Are you under contract? What are your contract expiration dates?
- Provide copies of contracts and one month's bill for each meter

ADDITIONAL INFORMATION

- Deregulated states only
- Building owner/operator
- No minimum requirements

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Pharmacy Benefits Management

SourceRx is a revolutionary Pharmacy Benefits Management (PBM) Program that delivers self-insured employers an average savings of 25% on pharmaceutical costs. The program features greater stability in specialty drug prices, increased transparency and PBM accountability, and the buying power of the nation's longest-standing nonprofit PBM coalition with more than $700 million in annual spend and 2 million covered lives.

FEATURES & BENEFITS

- Plan Design Flexibility – empower employers to choose a Transparent, Traditional, or Average Script Price plan design to meet their unique.
- Claims-Level Pricing Guarantees – coalition pricing on a per claim, per employer basis – not in the aggregate.
- Built-in Price Decreases – as the size of the coalition increases, pricing for all participating groups decreases.
- Three-Year Pricing Guarantee – protects against future prescription drug price increases.
- Transparency – clarity in the classification of brand name, generic, and specialty drugs; stable discount rates.

GETTING STARTED

- Understand your current situation (what's working, not working, missing?)
- Are you self-insured? Are your pharmacy benefits carved out?
- Who is your current vendor(s)? What is your contract expiration date?
- How many employees do you have and what is your annual pharmacy spend?
- Provide 12-month's claims data for comprehensive market check

ADDITIONAL INFORMATION

- Nationwide coverage
- Self-insured employers
- 200+ employees

Getting Started

- Contact Sourcing Alliance
  - 844.289.6728
  - info@sourcingalliance.org
- Work with your dedicated Support Center Representative to determine if programs are additive and a good fit for your organization
- Connect you with the appropriate supplier point of contact for your organization