

Alliance for Innovation

AFI-2025-118

ADA Digital Accessibility

WCAG 2.1 AA / 2.2 AA

Consulting and Design

Proposal for

Workstreams 1-7

Tab 3



CONVERGE ACCESSIBILITY
NARROWING THE DIGITAL DIVIDE

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Executive Summary

This section describes how Converge delivers services under the AFI/Edge Public cooperative contract from onboarding through steady-state program operations. Converge provides an end-to-end set of digital accessibility services across Workstreams 1–7, delivered through modular Product/Service IDs with consistent onboarding, quality controls, and reporting.

Converge’s delivery approach is designed for public-sector reality: large and diverse portfolios, mixed ownership across departments, vendor-managed platforms, uneven technical maturity, and constant change. Agencies can start with targeted assessments of high-impact sites and applications, expand to roadmaps and governance, and then sustain progress through remediation planning, verification, training, scanning operations, and document/media support—without being forced into a proprietary toolset or an all-at-once compliance overhaul.

Across all Product/Service IDs, Converge emphasizes

- (1) clear scope definition during onboarding,
- (2) practical and defensible prioritization tied to resident impact and service importance,
- (3) accountability clarity by separating vendor/platform defects from agency content/configuration issues, and
- (4) deliverables that are usable by both implementers and leadership.

Converge works in the agency’s existing tools and workflows (e.g., MS Teams, Google Workspace, and the agency’s ticketing/tracking system), and provides platform access only when a platform is part of the purchase (Pope Tech, WebAlign, or training subscriptions).

This section also describes how Converge manages quality, change control, sensitive information, and escalation; how agencies initiate work and scale to new sites/apps over time; and how Converge provides status reporting that supports both technical teams and executive stakeholders.

Requested Information

2.1 Overall Customer Experience & Program Delivery

- *Describe in detail the customer experience from start to finish for a typical agency utilizing this contract, including:*
 - *Initial discovery and onboarding*
 - *Assessment and roadmap phases*
 - *Remediation and monitoring*
 - *Ongoing governance and improvement*

Service and product delivery varies based on the product or service ID required. Tab 2 describes each service or product ID offered under this proposal. This section describes the customer experience for each one. For clarity, the following terminology is used in this tab.

- an **issue log** is the exported list of findings (Excel/CSV);
- a **backlog** is implementation-ready tickets with acceptance criteria; and
- a **tracker** is the status view used to show what's in progress, blocked, or complete.

Converge can work in secure government environments. We can test sites and applications that require logins and multi-factor authentication and we do not need administrator access. When access or data sharing is restricted, we coordinate a practical approach (production or staging) that protects sensitive information while still producing clear, defensible findings.

118-1.01 Full Manual Accessibility Assessment (fixed price option)

This service is used when an agency needs a strong, defensible baseline for a high-importance websites or applications. Converge keeps scope practical by focusing on representative templates/components and the resident workflows that matter most, then delivers findings that are easy to assign to the right owner (vendor vs. agency).

- **Initial discovery and onboarding:** Converge confirms the digital property in scope (website, web application, mobile application, or online portal) and any access needs (credentials, MFA, staging vs. production). We then do a recorded walkthrough with the agency to identify key templates/components, common content patterns, and the resident workflows that matter most. Based on this, we propose a representative test plan (pages/screens + end-to-end workflows), confirm scope with the agency, and provide a fixed price and clear statement of what will be tested.
- **Assessment and roadmap phases:** Converge performs manual expert testing using assistive technology as appropriate (keyboard and screen reader testing as a

baseline, plus other AT as needed). We deliver an issue log (exportable Excel/CSV) and summary report that document what failed, why it matters, and what to do next. Each finding includes evidence, the applicable WCAG success criterion, a severity/risk rating based on user impact and service importance, and practical remediation guidance. Findings are also labeled as vendor/platform defects vs. agency content/configuration issues so fixes can be routed to the right party.

- **Remediation and monitoring:** Converge conducts a findings handoff session with agency staff and/or vendors to review results, answer questions, and confirm practical next steps. If requested, Converge can convert findings into a prioritized remediation backlog with acceptance criteria under *118-3.01 Remediation Planning and Backlog Development*, provide design/front-end implementation guidance under *118-3.02 Design/UX and Front-End Implementation Support*, and perform verification/regression testing after fixes are made under *118-1.06 Verification and Regression Testing*.
- **Ongoing governance and improvement:** If requested, Converge supports a sustained program through roadmap planning under *118-2.01 Accessibility Roadmap and Phased Action Plan*, ongoing advisory support under *118-2.02 Ongoing Advisory and Program Support*, and policy/governance/procurement support under *118-5.01 Policy, Governance, and Program Management Support* so accessibility work stays coordinated across teams and vendors as systems and content change.

118-1.02 Full Manual Accessibility Assessment (T&M option)

This Product/Service ID follows the same delivery process described for *118-1.01 Full Manual Accessibility Assessment (fixed price option)*, with two differences: the work is performed on a time-and-materials basis, and the agency can set practical guardrails up front.

- **Initial discovery and onboarding:** Same intake and walkthrough as *118-1.01 Full Manual Accessibility Assessment (fixed price option)*, plus confirmation of any not-to-exceed amount (if desired), checkpoints, and a priority order if the agency wants the assessment executed in phases.
- **Assessment and roadmap phases:** Same manual expert and assistive-technology testing approach and the same issue log/report format as *118-1.01 Full Manual Accessibility Assessment (fixed price option)*, but performed in the agreed priority order based on the guardrails set during onboarding.
- **Remediation and monitoring:** Same findings handoff and optional follow-on support as *118-1.01 Full Manual Accessibility Assessment (fixed price option)*, including optional backlog/acceptance criteria support under *118-3.01*

Remediation Planning and Backlog Development, implementation support under *118-3.02 Design/UX and Front-End Implementation Support*, and verification/regression testing under *118-1.06 Verification and Regression Testing*.

- **Ongoing governance and improvement:** Same optional program support as *118-1.01 Full Manual Accessibility Assessment (fixed price option)*, including roadmap planning under *118-2.01 Accessibility Roadmap and Phased Action Plan*, ongoing advisory support under *118-2.02 Ongoing Advisory and Program Support*, and policy/governance/procurement support under *118-5.01 Policy, Governance, and Program Management Support*.

118-1.03 Manual Use Case Testing (fixed price option)

This Product/Service ID is designed for task-focused applications where the main question is whether residents can complete the key task (for example, paying a bill, booking an appointment, submitting a request, or completing an application). It is more targeted than *118-1.01 Full Manual Accessibility Assessment (fixed price option)* and is priced per application. In general, this Service ID and *118-1.04 Manual Use Case Testing (T&M)* provide a cost-effective solution for the dozens of websites and web applications most public entities use.

- **Initial discovery and onboarding:** The agency provides the application URL and, if needed, test credentials or access steps. We confirm the specific task(s) the agency wants tested. If the agency does not specify workflows, Converge proposes the most common end-to-end workflow(s) based on how the application is designed and confirms that scope with the agency before testing begins.
- **Assessment and roadmap phases:** Converge performs manual expert testing of the agreed workflow(s), using assistive technology as appropriate (keyboard and screen reader testing as a baseline). Because the scope is workflow-based, we focus on barriers that block or materially interfere with task completion, rather than documenting every minor issue across every screen. Deliverables include an issue log (exportable Excel/CSV) and summary report with evidence, WCAG references, severity/risk ratings, and practical remediation guidance. Findings are labeled as vendor/platform defects vs. agency content/configuration issues to support efficient routing and vendor accountability.
- **Remediation and monitoring:** Converge conducts a results handoff session with agency staff and/or vendors to explain what is preventing task completion and to clarify fix approaches. If requested, Converge can translate findings into a prioritized backlog with clear acceptance criteria under *118-3.01 Remediation Planning and Backlog Development* and provide implementation guidance under *118-3.02 Design/UX and Front-End Implementation Support*.

Verification/regression testing after fixes is available under *118-1.06 Verification and Regression Testing*.

- **Ongoing governance and improvement:** Manual Use Case Testing is often used as a practical starting point to establish priorities before committing to broader testing. If requested, Converge can support phased planning and ongoing improvement through roadmap work under *118-2.01 Accessibility Roadmap and Phased Action Plan*, ongoing advisory support under *118-2.02 Ongoing Advisory and Program Support*, and governance/procurement support under *118-5.01 Policy, Governance, and Program Management Support*.

118-1.04 Manual Use Case Testing (T&M)

This service is the fastest way to get an objective view of whether residents can complete essential tasks without committing to a full audit. Because it is time-and-materials, effort scales based on workflow complexity and the guardrails the agency sets (not-to-exceed, priority order, and checkpoints). A time-and-materials option is appropriate where the important use cases for residents means the scope of the effort is either much smaller than a typical web application (such as filling out a single form) or much larger than a typical application (such as testing applications for user login and account management features). As noted earlier, this Service ID and *118-1.03 Manual Use Case Testing (fixed price option)* provide a cost-effective solution for the dozens of websites and web applications most public entities use.

- **Initial discovery and onboarding:** Same as *118-1.03 Manual Use Case Testing (fixed price option)*, plus confirm a not-to-exceed amount (if desired), checkpoints, and workflow/application priority order.
- **Assessment and roadmap phases:** Same as *118-1.03 Manual Use Case Testing (fixed price option)*, with work performed in the agreed priority order.
- **Remediation and monitoring:** Same as *118-1.03 Manual Use Case Testing (fixed price option)*, including results handoff; optional backlog/acceptance criteria support under *118-3.01 Remediation Planning and Backlog Development*; optional implementation support under *118-3.02 Design/UX and Front-End Implementation Support*; and optional verification under *118-1.06 Verification and Regression Testing*.
- **Ongoing governance and improvement:** Same as *118-1.03 Manual Use Case Testing (fixed price option)*; broader program support is available under *118-2.01 Accessibility Roadmap and Phased Action Plan*, *118-2.02 Ongoing Advisory and Program Support*, and/or *118-5.01 Policy, Governance, and Program Management Support* if requested.

118-1.05 Automated Testing Operations and Triage (tool-agnostic support)

Automated scanning is most useful when results are tuned, cleaned up, and explained so teams are not buried in noise, such as false positives or unnecessary warnings. Converge is tool-agnostic and focuses on making scan outputs actionable— adjusting the approach and level of effort based on the agency’s portfolio, the access limits of the environment (logins/MFA), and how much operational support the agency wants Converge to provide.

- **Initial discovery and onboarding:** Converge confirms the scanning scope (domains/subdomains and any include/exclude rules), access needs (logins, MFA, etc), and which automated testing tool the agency will use (e.g., Pope Tech, DubBot, or another platform). We then configure and tune scans so they target the right content and avoid common crawl problems (duplicate paths, non-existent pages, and other non-meaningful content). Where authentication is required, we help establish a practical approach for access and validate that scans run reliably before the agency relies on results.
- **Assessment and roadmap phases:** Converge runs scans and then triages results so they are usable. Automated tools can produce large volumes of findings, including false positives and warning-level items that agencies may misinterpret. We reduce noise, highlight repeat patterns that drive the most risk, and provide a practical prioritization view (critical/high/medium/low) based on user impact and service importance. We also help agencies understand what automated results can and cannot prove, and when targeted manual follow-up is warranted under *118-1.01 Full Manual Accessibility Assessment (fixed price option)*, *118-1.02 Full Manual Accessibility Assessment (T&M option)*, or *118-1.03 Manual Use Case Testing (fixed price option)*.
- **Remediation and monitoring:** Converge does not perform hands-on remediation under this Product/Service ID. Our role is to ensure scan outputs can drive remediation efficiently by routing issues to the right owner. Where possible, we help agencies distinguish likely vendor/platform defects from agency content/configuration issues so vendors receive actionable defect reports and agency teams focus on issues they can control. We can also support re-scanning after fixes to confirm that trends are moving in the right direction and to detect regressions as content changes. Verification of specific fixes can be performed under *118-1.06 Verification and Regression Testing*.
- **Ongoing governance and improvement:** Automated testing is most effective when it is part of normal web publishing practices. If requested, Converge helps agencies define how scan results are reviewed, how often scans occur, who receives outputs, what thresholds trigger action, and how recurring issues are reduced over

time. Broader alignment to program governance, reporting, and continuous improvement is available under *118-2.02 Ongoing Advisory and Program Support* and/or *118-5.01 Policy, Governance, and Program Management Support*.

118-1.06 Verification and Regression Testing

This service is how agencies close the loop after fixes are implemented and avoid “we think it’s fixed” uncertainty. The scope is intentionally targeted and scales based on what changed (templates/components vs. isolated pages) and how much the agency wants Converge involved—light confirmation for a few fixes, or broader regression coverage when changes can impact many workflows.

- **Initial discovery and onboarding:** Converge confirms the baseline that will be re-tested (the original assessment scope, representative pages/workflows, and the specific findings being verified). We then confirm what has changed (fixes applied, releases deployed, templates/components updated), which environment should be tested (production or staging), and any access details (credentials, MFA, test accounts). Based on this, we define the re-test scope so verification is focused on the items that matter and the areas likely impacted by changes.
- **Assessment and roadmap phases:** Converge re-tests the applicable pages and workflows using the same manual and assistive-technology methods used in the original assessment (keyboard and screen reader testing as a baseline, plus other AT as needed). Verification focuses on whether issues are fully resolved, partially resolved, still present, or replaced by a new barrier introduced during remediation. Where fixes affect shared templates or components, we also spot-check representative instances to confirm the fix is consistently applied.
- **Remediation and monitoring:** Converge delivers clear verification results so agencies and vendors can close out work with confidence. Results identify what was re-tested, what passed, what failed, and what changed since the original report. If issues remain, we explain why and what must be adjusted. If regressions are found, we document them clearly and describe practical next steps. Where issues are found, we conduct a short handoff session to ensure implementers understand errors, desired outcomes, and remediation techniques. This avoids agencies and vendors from unnecessary work and enables them to focus on immediate fixes.
- **Ongoing governance and improvement:** If requested, Converge helps agencies use verification as part of a repeatable quality-control process, such as defining when re-testing is required, what constitutes “done,” and how accessibility checks fit into release and publishing cycles. Program-level process support is available

under *118-5.01 Policy, Governance, and Program Management Support* and ongoing program oversight under *118-2.02 Ongoing Advisory and Program Support*.

118-2.01 Accessibility Roadmap and Phased Action Plan

Converge tailors roadmap work to the agency’s size, complexity, and preferred level of involvement. Some agencies want Converge to provide a clear plan and decision tools so they can lead implementation internally. Others prefer more hands-on support to coordinate stakeholders, align departments and vendors, and keep work moving through regular check-ins and program management support. In all cases, the roadmap is designed to be practical, phased, and usable—so the agency can make steady progress without overcommitting resources. Converge understands how to ensure that a roadmap also serves as a valuable tool to demonstrate to federal regulators that a public entity is meeting its due diligence requirements.

- **Initial discovery and onboarding:** Converge begins with leadership-focused discovery to understand the agency’s digital portfolio (websites, applications, documents, and media), how work is currently funded and staffed, and how decisions are made across IT, communications, procurement, legal/risk, and program teams. We confirm key stakeholders and establish a working cadence. We also identify practical constraints early (siloes ownership, vendor dependence, decentralized purchasing, limited testing capacity) so the roadmap reflects the agency’s real operating environment.
- **Assessment and roadmap phases:** Converge develops a multi-phase roadmap that sequences work based on user impact, service importance, and feasibility. This typically includes a prioritization approach (what to address first and why), a phased plan aligned to capacity and budget, and decision tools that staff can reuse (for example, simple prioritization matrices and intake/triage criteria). The roadmap also clarifies roles and responsibilities, including how to engage vendors and what “minimum acceptable outcomes” look like for high-risk services.
- **Remediation and monitoring:** The roadmap defines how assessments, remediation planning, and monitoring fit together operationally—how issues will be routed (vendor vs. agency), how backlogs will be managed, when verification occurs, and what information leadership needs to track progress. If the agency is using or considering automated scanning, the roadmap explains how scanning will support continuous improvement without replacing manual testing where it is required.
- **Ongoing governance and improvement:** The roadmap includes a practical approach for sustaining progress over time, including governance touchpoints (who

meets, how often, and what decisions are made), a reporting rhythm, and a method for updating priorities as systems change or new services are introduced. Ongoing roadmap reviews and adjustments are available under *118-2.02 Ongoing Advisory and Program Support*, and policy/governance implementation support is available under *118-5.01 Policy, Governance, and Program Management Support*.

118-2.02 Ongoing Advisory and Program Support (T&M option)

Converge tailors ongoing support to match how the agency prefers to run its program. Some agencies want light-touch support—periodic check-ins to confirm priorities, sanity-check vendor plans, and keep the roadmap current. Others want more hands-on program support to coordinate stakeholders, prepare leadership briefings, and keep work moving across departments and vendors. The level of effort scales with portfolio complexity and the role the agency wants Converge to play.

- **Initial discovery and onboarding:** Converge confirms the agency’s goals for advisory support, the stakeholders involved, and the working cadence (for example, monthly, quarterly, or aligned to release cycles). We agree on how the agency wants to engage (standing meetings, working sessions, short memos, vendor calls, and/or ad hoc support) and establish practical intake and tracking for questions, decisions, and action items.
- **Assessment and roadmap phases:** Converge helps the agency keep priorities clear as conditions change. This includes reviewing progress against the roadmap, updating sequencing when new systems or risks emerge, and helping the agency decide what to test next, what to remediate first, and what can reasonably be deferred. We also provide practical guidance on vendor engagement, staffing needs, and budgeting assumptions so planning stays realistic and defensible.
- **Remediation and monitoring:** Converge supports execution by helping agencies interpret findings, translate them into actionable next steps, and avoid common failure modes (for example, spending heavily on low-impact issues, relying on automated results as proof of compliance, or testing applications that are about to be replaced). We also help agencies manage vendor responses by clarifying responsibilities, validating remediation plans, and identifying when verification is needed under *118-1.06 Verification and Regression Testing*.
- **Ongoing governance and improvement:** Converge helps agencies sustain the program through consistent decision-making and repeatable practices. This can include ongoing steering committee support, leadership-ready status updates, refreshes to internal guidance and procurement language, and continuous improvement recommendations based on what is working and what is creating friction. Program governance deliverables and facilitation support are available

under *118-5.01 Policy, Governance, and Program Management Support* when the agency wants more formal structures and documentation.

118-3.01 Remediation Planning and Backlog Development

This service turns assessment results into a work plan that agency teams and vendors can execute. The goal is to reduce churn and rework by making scope, priorities, and “done” criteria clear—especially when multiple departments and vendors share responsibility.

- **Initial discovery and onboarding:** Converge confirms the inputs to be used (audit reports, issue logs, scan exports, prior tickets) and the agency’s preferred work management approach (for example, Jira, Azure DevOps, ServiceNow, or Excel). We also confirm who will fix what (internal teams vs. vendors), how the agency wants to group work (by system, workflow, component, or department), and any constraints such as release schedules or vendor contract boundaries.
- **Assessment and roadmap phases:** Converge translates findings into a prioritized backlog (implementation-ready tickets with acceptance criteria) that is structured for implementation. This typically includes grouping related issues, identifying repeat patterns, and sequencing work based on user impact and service importance. Each backlog item includes clear remediation guidance and acceptance criteria so implementers understand what must be true for the issue to be considered complete. Where applicable, we separate vendor/platform defects from agency content/configuration issues so work can be routed cleanly and vendor accountability is straightforward.
- **Remediation and monitoring:** Converge reviews the backlog with agency staff and/or vendors to confirm shared understanding of priorities and expectations. We help teams anticipate common implementation pitfalls, clarify questions, and adjust backlog structure if it will make execution easier. If requested, Converge can participate in working sessions during remediation to review proposed solutions, provide design/front-end guidance, and help validate fixes under *118-3.02 Design/UX and Front-End Implementation Support* and *118-1.06 Verification and Regression Testing*.
- **Ongoing governance and improvement:** If requested, Converge helps agencies make backlog management repeatable by defining intake/triage rules, ownership conventions, and closure criteria that can be reused across future projects and procurements. Broader governance and program management support is available under *118-5.01 Policy, Governance, and Program Management Support*, and ongoing advisory support under *118-2.02 Ongoing Advisory and Program Support*.

118-3.02 Design/UX and Front-End Implementation Support

This service provides practical guidance to the people implementing fixes—developers, UX/design staff, content teams, and vendors. Agencies use it when they want to move from “we know what’s wrong” to “we know exactly how to fix it,” especially for shared templates, components, and design system patterns that affect many pages or workflows.

- **Initial discovery and onboarding:** Converge confirms which systems and teams are in scope (internal development teams, vendor teams, UX/design, content authors) and what assets will be reviewed (templates, components, design system guidance, wireframes/mockups, front-end code, or CMS patterns). We also confirm how the agency wants to work—working sessions, structured reviews, or a mix—and how decisions will be documented so changes are consistent across teams and vendors.
- **Assessment and roadmap phases:** Converge reviews designs and front-end implementations for accessibility risks and provides clear, practical recommendations. This can include wireframe and mockup reviews, guidance on accessible page templates and component patterns, and reviews of HTML, CSS, JavaScript, and templates. Where helpful, we provide examples and implementation notes so teams understand what “good” looks like and can apply patterns consistently. If the agency is using WebAlign as a requirements framework, we can align guidance to role-based checklists so designers, developers, and testers are working from the same expectations.
- **Remediation and monitoring:** Converge participates in working sessions with agency and vendor teams to guide remediation work, answer implementation questions, and reduce rework. We help teams focus on fixes that materially improve user experience and reduce risk, especially for high-impact workflows. After changes are implemented, Converge can help validate results by reviewing “before/after” outcomes and, when requested, by performing verification and regression testing under *118-1.06 Verification and Regression Testing*.
- **Ongoing governance and improvement:** If requested, Converge helps agencies make improvements durable by documenting accessible patterns, establishing practical review checkpoints (for example, design review, pre-release review), and aligning expectations across teams and vendors. Broader policy and governance structures that support consistent implementation are available under *118-5.01 Policy, Governance, and Program Management Support*, with ongoing oversight available under *118-2.02 Ongoing Advisory and Program Support*.

118-4.01 On-Demand Training Videos (Per Seat)

This service gives agencies a simple way to build baseline accessibility awareness and

reduce repeat defects without scheduling live training for every new staff member. Agencies can assign seats to specific roles (for example, content authors, document authors, managers, procurement, or communications staff) and use the training for onboarding and refreshers.

- **Initial discovery and onboarding:** Converge confirms the number of seats purchased and provisions user access to Converge’s training platform. The agency provides learner names and email addresses, and Converge issues login instructions and supports basic access troubleshooting as needed.
- **Assessment and roadmap phases:** This Product/Service ID is a training subscription (not an assessment service). Agencies assign training to appropriate staff and can use it alongside assessments and roadmap work so teams understand the requirements behind the findings they are seeing.
- **Remediation and monitoring:** Training reduces rework by helping staff avoid the most common accessibility mistakes in day-to-day publishing and document creation. Agencies can use the training to support remediation by ensuring the people making changes understand the basics before fixes are implemented.
- **Ongoing governance and improvement:** Converge maintains the training platform and supports seat changes over time as staff roles change. If requested, agencies can pair training with office hours to reinforce learning in real situations under *118-4.06 Office Hours and Coaching*.

118-4.02 On-Demand Training Videos (Unlimited)

This service is intended for larger agencies that need broad access (for example, 100+ learners) or want a simple way to train many roles without managing seat limits. It is also a prerequisite for training customization under *118-4.03 On-Demand Training Video Customization*.

- **Initial discovery and onboarding:** Converge confirms the agency-wide license and establishes the onboarding approach for provisioning access. The agency provides learner names and email addresses as needed, and Converge issues login instructions and supports basic access troubleshooting.
- **Assessment and roadmap phases:** This Product/Service ID is a training subscription (not an assessment service). Agencies can assign training by role and use it to support broader roadmap goals by building baseline understanding across departments.
- **Remediation and monitoring:** Training helps reduce repeat defects by improving the quality of day-to-day publishing and document creation. Agencies can use the

training to support remediation by ensuring the people implementing fixes understand common requirements before changes are made.

- **Ongoing governance and improvement:** Converge maintains the training platform and supports account changes as staff roles change. Agencies can reinforce adoption with live support under *118-4.06 Office Hours and Coaching* if requested.

118-4.03 On-Demand Training Video Customization

This service allows agencies to tailor Converge’s on-demand training to their environment (branding, terminology, workflows, and tool screenshots). Purchase of *118-4.02 On-Demand Training Videos (Unlimited)* is required before customization so the agency has organization-wide access to the customized modules. This is an ideal and highly cost-effective solution where agencies want to develop videos targeted to their specific work environment and CMS. Because the videos are then client-specific, Converge encourages clients to deploy their customized content through their own channels, hosted environments, learning management systems (LMSs), etc.

- **Initial discovery and onboarding:** Converge confirms which training module(s) the agency wants customized, the intended audience, and what needs to change (branding, terminology, agency-specific processes, CMS or tool screenshots, and any local policy references). We also confirm the review/approval process and who will provide agency inputs and sign-off.
- **Assessment and roadmap phases:** Converge shares the baseline module scripts and identifies the parts that can be efficiently customized. The agency provides edits and any needed assets (logos, preferred terminology, example screenshots, or workflow references). Converge incorporates changes using our animation and text-to-speech production approach, which allows updates without re-filming or re-recording live presenters.
- **Remediation and monitoring:** Converge delivers the customized module(s) and supports review cycles to ensure the content reflects the agency’s environment and is ready for rollout. If the agency wants the customized training to directly reinforce specific findings or recurring issues, we can align examples to the agency’s most common barriers and publishing patterns.
- **Ongoing governance and improvement:** Agencies can update customized modules over time as tools, processes, or terminology change, billed on a time-and-materials basis under this Product/Service ID. Agencies often pair customized training with office hours under *118-4.06 Office Hours and Coaching* to reinforce learning with real examples.

118-4.04 WebAlign Requirements Framework (Per Seat)

This service is intended for agencies that want detailed, role-based accessibility requirements and guidance to support consistent implementation across designers, developers, testers/QA, copy authors, and media/document staff. WebAlign translates WCAG into clear “core concepts” and role-based checklists so teams can apply requirements from early design through release and maintenance. PPAs interested in purchasing more than 100 annual licenses should consider *118-4.05 WebAlign Requirements Framework (Unlimited)* instead.

- **Initial discovery and onboarding:** Converge confirms the number of seats and provisions user access to the WebAlign platform. The agency provides user names and email addresses, and Converge issues login instructions and supports basic access troubleshooting as needed.
- **Assessment and roadmap phases:** This Product/Service ID is a platform subscription (not an assessment service). Agencies use WebAlign to clarify expectations, reduce interpretation disputes, and support planning by giving teams a shared requirements baseline.
- **Remediation and monitoring:** WebAlign supports remediation by helping teams apply consistent fix patterns and validate work against clear requirements. It is especially useful when multiple teams or vendors are involved and the agency needs consistent acceptance criteria for design and development work.
- **Ongoing governance and improvement:** Agencies can keep WebAlign in place as an ongoing reference and onboarding tool as staff change over time. For broader governance structures and procurement integration, agencies can pair WebAlign with *118-5.01 Policy, Governance, and Program Management Support* if requested.

118-4.05 WebAlign Requirements Framework (Unlimited)

This service is intended for agencies that want broad access to WebAlign across many roles and teams without managing seat limits. It is often used when multiple departments (or many vendors) need to work from the same set of accessibility requirements and acceptance criteria.

- **Initial discovery and onboarding:** Converge confirms the agency-wide license and establishes the onboarding approach for provisioning access. The agency provides user names and email addresses as needed, and Converge issues login instructions and supports basic access troubleshooting.
- **Assessment and roadmap phases:** This Product/Service ID is a requirements framework subscription (not an assessment service). Agencies use WebAlign to

create a shared understanding of requirements across designers, developers, QA/testers, content authors, procurement, and program staff.

- **Remediation and monitoring:** WebAlign supports remediation by giving teams clear role-based checklists and acceptance criteria so fixes are implemented consistently and reviewed efficiently. It also helps agencies reduce rework when multiple teams or vendors interpret WCAG differently.
- **Ongoing governance and improvement:** Agencies use WebAlign as an ongoing reference and onboarding tool as staff and vendors change over time. If requested, Converge can help agencies integrate WebAlign into internal workflows (for example, design review checkpoints or QA checklists) under *118-5.01 Policy, Governance, and Program Management Support* and/or *118-2.02 Ongoing Advisory and Program Support*.

118-4.06 Office Hours and Coaching

This service gives agencies practical, real-time support to reduce rework and unblock teams during publishing, remediation, and implementation. It works especially well when staff are trying to apply requirements to real pages, documents, and workflows and need quick answers rather than another long report.

- **Initial discovery and onboarding:** Converge confirms the agency's point of contact, preferred intake method (email, shared tracker, scheduled sessions), and the tools/environments in use (CMS, document tools, design tools, issue tracker). The agency can submit examples in advance (URLs, screenshots, draft documents, questions) so time is used efficiently.
- **Assessment and roadmap phases:** Office hours are not a formal assessment, but they often support roadmap work by clarifying what is feasible, identifying recurring problem areas, and helping internal teams understand what the requirements mean in practice.
- **Remediation and monitoring:** Converge answers implementation questions, reviews real examples, and provides practical guidance to resolve issues at the source. This can include content and document fixes, interpretation of audit or scan findings, and advice on how to validate that a change actually worked.
- **Ongoing governance and improvement:** Over time, Converge can identify recurring themes (the same errors showing up across teams) and recommend lightweight process improvements, job aids, or targeted training modules to reduce repeat defects. Broader program improvements can be supported under *118-2.02 Ongoing Advisory and Program Support* and/or *118-5.01 Policy, Governance, and Program Management Support*.

118-5.01 Policy, Governance, and Program Management Support

This service helps agencies operationalize accessibility across departments and vendors through practical policies, decision structures, and repeatable processes. The level of effort scales based on agency size, how centralized the organization is, and how much hands-on program management support the agency wants Converge to provide.

- **Initial discovery and onboarding:** Converge confirms the agency’s governance context (centralized vs. decentralized decision-making), key stakeholders (IT, communications, procurement, legal/risk, ADA coordination, and program teams), and the current state of policies, standards, vendor language, and internal workflows. We establish a practical working cadence and identify where decisions get stuck (for example, siloed departments, unclear ownership, or vendor dependencies).
- **Assessment and roadmap phases:** Converge drafts or refines the core program materials agencies need to run accessibility as a normal business process. This can include policies, standards, guidelines, checklists, acceptance criteria, maturity/gap assessments at the program level, communications plans and associated documents, and governance charters that define roles, decision rights, and escalation paths. We also advise on procurement language and contract requirements so accessibility expectations are clear for vendors and can be enforced through acceptance testing and remediation obligations.
- **Remediation and monitoring:** Governance work supports remediation by clarifying who owns fixes, how issues are routed (vendor vs. agency), what “done” means, and what requires verification. Converge can facilitate cross-functional working sessions or steering committee meetings to resolve issues that stall remediation, align stakeholders, and keep vendors accountable.
- **Ongoing governance and improvement:** Converge helps agencies keep the program sustainable through repeatable meeting rhythms, reporting approaches, onboarding guidance for new systems and vendors, and periodic refreshes to policies and standards as requirements and systems evolve. Agencies can pair this work with ongoing advisory support under *118-2.02 Ongoing Advisory and Program Support* to keep priorities current and maintain momentum.

118-6.01 PDF Remediation (Offshore)

This service provides direct remediation of PDFs and other common document types to make existing documents accessible. Agencies typically use it for high-volume remediation of legacy libraries or ongoing remediation of newly published documents. Pricing is based on document complexity using the pricing schedule in Tab 2.

- **Initial discovery and onboarding:** Through an AFI-specific portal on our website, Converge confirms the agency point of contact, preferred communication method, and any document handling requirements. Through this portal, agencies can provide documents for review, get a quote for the cost of remediation, and receive remediated versions back in an organized way. We also confirm whether any documents are too sensitive for offshore handling and should instead be routed to *118-6.02 PDF Remediation (Onshore)*.
- **Assessment and roadmap phases:** After documents are submitted through the portal, Converge reviews them and provides a quote based on the pricing schedule (for example, simple vs. complex pages, complex images for alt text, and color contrast adjustments if applicable). Agencies can approve the quote as submitted or adjust scope (for example, prioritize a subset of documents) before remediation begins.
- **Remediation and monitoring:** Converge remediates documents so they meet accessibility requirements (including structure/tags, reading order, headings/lists, links, tables, and form fields as applicable). Remediated documents are delivered back to the agency through the contact channel identified during intake along with any basic notes needed to support use and publishing. This service is focused on producing accessible documents; ongoing monitoring of agency document inventories is not included unless separately requested.
- **Ongoing governance and improvement:** If requested, Converge can help agencies reduce future remediation volume by identifying recurring authoring issues and recommending templates, workflows, and training. Broader process and training support is available under *118-4.01/118-4.02 On-Demand Training Videos*, *118-4.06 Office Hours and Coaching*, and/or *118-5.01 Policy, Governance, and Program Management Support*.

118-6.02 PDF Remediation (Onshore)

This service provides onshore document remediation when agencies have sensitive content that cannot be handled offshore (for example, CJIS-related documents or other restricted materials). Work is performed by Converge staff in the United States on a time-and-materials basis.

- **Initial discovery and onboarding:** Converge confirms the agency point of contact, document handling requirements, and the secure method the agency will use to provide documents for review and receive remediated versions back. We also confirm any constraints such as access controls, redaction rules, or environment limitations that affect how files can be handled.

- **Assessment and roadmap phases:** Converge reviews submitted documents and provides a quote and delivery expectation based on complexity and volume. Agencies can approve the quote as submitted or adjust scope (for example, prioritize certain documents) before work begins.
- **Remediation and monitoring:** Converge remediates documents so they meet accessibility requirements (including structure/tags, reading order, headings/lists, links, tables, and form fields as applicable) and delivers accessible versions back to the agency using the agreed secure method. This service is focused on producing accessible documents; ongoing monitoring of agency document inventories is not included unless separately requested.
- **Ongoing governance and improvement:** If requested, Converge can identify recurring authoring issues and recommend steps to reduce future remediation needs through templates, workflows, and training. Broader process and training support is available under *118-4.01/118-4.02 On-Demand Training Videos, 118-4.06 Office Hours and Coaching, and/or 118-5.01 Policy, Governance, and Program Management Support.*

118-6.03 Document Workflow Consulting (T&M)

This service helps agencies reduce document risk at the source by building sustainable document creation and remediation practices—so the agency is not forced into perpetual, high-volume remediation. Agencies use this service when they need accessible templates, clear authoring rules, lightweight QA controls, and a practical operating model across decentralized departments. Agencies also use this service to help communicate to agency staff in a simplified manner through the creation of cross-functional flow charting (because everyone “should not be told how the sausage is being made”—thus avoiding unnecessarily complicating messaging).

- **Initial discovery and onboarding:** Converge confirms document types and publishing channels (PDF, Word, forms, board packets, agendas/minutes, flyers, reports), current authoring tools and workflows, and where documents originate (departments, vendors, legacy systems). We also confirm risk drivers (high-visibility public documents, legally required notices, time-sensitive service documents) and the agency’s preferred level of standardization (central templates vs. department-owned templates).
- **Assessment and roadmap phases:** Converge reviews representative samples and current practices to identify the highest-impact failure patterns (structure/tags, reading order, tables, form fields, link text, headings, color/contrast, and image handling). We then produce practical workflow recommendations that match how

staff actually work, including role-based responsibilities and “what must be true before publishing.” Where helpful, Converge provides decision flowcharts that simplify expectations for staff while still reflecting risk tolerance and legal requirements.

- **Remediation and monitoring:** Converge delivers usable assets and documentation such as updated templates (e.g., Word templates), a document style guide, QA checklists, and a recommended intake/triage model (what gets remediated, what gets replaced, what gets retired). If the agency wants, Converge can pilot the workflow with one department and refine it before broader rollout.
- **Ongoing governance and improvement:** Agencies can pair this work with training and reinforcement to reduce repeat defects, including 118-4.01/118-4.02 On-Demand Training Videos, 118-4.06 Office Hours and Coaching, and/or 118-5.01 Policy, Governance, and Program Management Support. Converge can also recommend sampling approaches and light-touch QA checkpoints to keep document quality stable as staff and vendors change.

118-7.01 Media Accessibility Consulting and Vendor Support

This service helps agencies plan and manage accessibility for video, audio, and multimedia content. Converge is vendor-neutral and focuses on practical requirements, workflow guidance, and procurement-ready specifications so agencies can select and manage captioning and media vendors effectively.

- **Initial discovery and onboarding:** Converge confirms the types of media in scope (recorded video, live streams, podcasts/audio, webinars, social media clips), where content is published, and the agency’s current production and publishing workflow. We also confirm how the agency currently handles captions, transcripts, audio description, and interpretation (if at all), and what constraints exist (budgets, turnaround needs, volume, and internal staffing).
- **Assessment and roadmap phases:** Converge reviews a representative sample of media and the agency’s publishing practices to identify gaps and set priorities. We provide practical guidance on requirements (captions, transcripts, audio description, and other accommodations as needed), recommended triage criteria (what to remediate first), and workflow changes that reduce risk without disrupting production. Where helpful, we provide plain-language specifications and quality expectations that agencies can use in procurements and vendor oversight.
- **Remediation and monitoring:** Converge does not act as the captioning or remediation vendor under this Product/Service ID. Instead, we help agencies manage remediation by advising on vendor selection, reviewing vendor outputs for

quality and completeness when requested, and helping agencies integrate vendor services into normal publishing. We also help agencies avoid common problems (for example, relying on low-quality auto-captions for public-facing content without appropriate review).

- **Ongoing governance and improvement:** Converge helps agencies make media accessibility repeatable by documenting standards, workflows, and roles (who requests captions, who reviews quality, where assets are stored, and how exceptions are handled). Broader policy and governance support is available under *118-5.01 Policy, Governance, and Program Management Support*, with ongoing advisory support under *118-2.02 Ongoing Advisory and Program Support*.

- *Outline how an existing AFI or Edge Public member would be transitioned into your program under this cooperative contract. Describe the expected user experience during transition, including any data migration, onboarding, or platform configuration activities*

AFI and Edge Public members can transition into Converge’s services under this cooperative contract without changing their current tools, vendors, or operating model. Many agencies already use scanning platforms (e.g., Monsido, Siteimprove), have prior audits or open vendor tickets, and work in environments that range from highly centralized to highly siloed. Converge is designed to be low-disruption in these environments. We do not require a “suite-first” approach, and most of our services do not depend on proprietary reporting platforms. Whenever possible, we deliver work through the agency’s existing tools and collaboration environments (e.g., Microsoft Teams, Google Workspace, and the agency’s ticketing system), so agencies can adopt the cooperative contract without a forced process overhaul.

- **What the transition experience looks like (typical steps).** Converge starts with a short transition discovery to understand the agency’s current state: existing tools and reports, vendor relationships, internal roles, how work is assigned and tracked, and what has already been done. There are no required “starter artifacts.” Instead, we ingest what the agency already has—prior scan exports and reports, prior audit reports, open vendor tickets, inventories of sites/apps/PDFs, workflow lists, roles, and any existing policies or standards—then determine what is reusable and what gaps remain. The better prior work is documented, the more continuity we can preserve and the less rework is required. This transition discovery also confirms which Workstreams and Product/Service IDs the agency wants to activate first (for example, assessments, roadmap planning, or targeted use case testing).

- **Data migration (when applicable).** “Data migration” is most relevant when an agency is changing monitoring/scanning tools or wants to preserve scan history. Most scanning platforms support exporting results (commonly CSV or JSON). Converge can use exports to preserve historical context and help agencies avoid losing momentum, while establishing a clear baseline for consistent reporting going forward. If an agency wants to keep its existing scanning platform, no migration is required; Converge can still provide scan operations and triage support under *118-1.05 Automated Testing Operations and Triage (tool-agnostic support)* using the agency’s existing tool.
- **Onboarding and platform configuration (when applicable).** If an agency wants Converge to configure or operate automated scanning, Converge performs scope setup, authentication support where needed, scan tuning, and practical result triage under *118-1.05 Automated Testing Operations and Triage (tool-agnostic support)*. If the agency adopts Pope Tech through this cooperative contract, onboarding and configuration include account setup, roles, scan scope, scan schedules, and training on how to interpret results. Converge can also deliver ongoing monitoring support using the agency’s preferred tracking method (ticketing system, spreadsheet, or exported issue log) rather than requiring a separate portal.
- **Preserving momentum while improving accountability.** The goal of transition is to preserve what is already working and improve what is slowing progress. Because Converge adapts to the agency’s structure—centralized or distributed procurement, small centralized teams or large silos—we can keep current workflows in place when that best supports continuity, or help agencies strengthen practices when they want change. A common transition improvement is clearer routing and accountability: separating issues that are vendor/platform defects from issues that are agency content/configuration, so the right party receives the right work and progress is easier to track across internal teams and vendors.

2.2 Orders, Engagements & Online Functions

- *Describe the ways in which PPAs can initiate and manage work with your company, including but not limited to:*
 - *Requesting assessments, remediation assistance, training, or advisory services*
 - *Configuring and accessing your platform/portal*
- *If your company provides a web-based portal as part of your consulting service delivery (at no separate license cost under this contract), describe its key features and ease of use, including:*
 - *Accessibility issue search, filtering, and drill-down capabilities*
 - *Visibility into compliance scores, trends, and risk indicators*
 - *Workflows for assigning, tracking, and verifying remediation tasks*

- *Access to order history, engagement history, and completed assessments*
- *Access to invoices, contracts, and reports online*
- *Describe your ability to integrate with or provide “punch-out” or single sign-on experiences from purchasing systems, portals, or intranets. Include your typical implementation timeline for these integrations*
- *Describe any minimum engagement thresholds (e.g., minimum professional services hours, minimum commitment level) and how you accommodate small entities with limited budgets*

PPAs can initiate and manage work with Converge in a simple, low-friction way. We do not require agencies to adopt a Converge-specific workflow system. Instead, we work through the agency’s existing procurement steps and the agency’s preferred collaboration and tracking tools (email, Microsoft Teams, Google Workspace, and the agency’s ticketing system). When a platform is part of the purchase (for example, Pope Tech, WebAlign, or Converge’s training site), we provision access and support setup so the agency can start using it quickly.

- **How PPAs request and manage services.** PPAs typically start work by selecting Product/Service IDs under this contract, requesting a quote or SOW for the specific scope, and then issuing a PO (or other purchasing instrument) through their normal process. From there, work is managed through a kickoff call and a simple point-of-contact model. Common request paths include:
 - Assessments and audits: provide the website/app/portal URL(s), any access steps (such as logins or multi-factor authentication), and the main tasks residents must complete. Converge confirms scope and coordinates a safe testing approach (production or staging, as preferred) before testing under the applicable assessment Product/Service IDs.
 - Remediation assistance: request backlog development and acceptance criteria and/or implementation support; Converge works with agency and vendor teams through working sessions and documented guidance.
 - Training and coaching: select per-seat or unlimited options, provide staff email addresses, and Converge provisions access and supports rollout; office hours can be scheduled on a recurring basis.
 - Advisory and roadmapping: request roadmap and/or ongoing advisory support; Converge establishes a cadence (for example, monthly or quarterly) and provides written deliverables and decision support.
 - Document remediation: submit documents for remediation through the remediation intake method described below; Converge returns accessible documents and a simple remediation log.

- **Configuring and accessing platforms and portals (when applicable).** Depending on the Product/Service IDs selected, Converge provisions and supports access to the relevant platform(s):
 - WebAlign requirements framework and Converge’s training platform are provisioned by user email address and supported by Converge for access troubleshooting.
 - Automated scanning is supported in the agency’s preferred tool (tool-agnostic), and if the agency uses Pope Tech (cloud-hosted SaaS; no on-prem deployment), Converge assists with configuration, scan scope, authentication, and scan tuning as needed.
 - For PDF remediation, Converge uses a simple web-based intake portal for document submission for the offshore remediation option. For onshore/sensitive remediation, Converge uses the agency’s preferred secure submission method.
- **Web-based portal features (when a portal is included at no separate license cost).** Converge does not provide a general-purpose “issue tracking portal” for audits and remediation. Agencies typically already have a ticketing system or workflow and Converge’s deliverables are designed to fit those tools. The web-based portal we provide under this contract is for PDF remediation intake and tracking. It is designed to be simple: upload documents, receive status updates, and receive completed accessible files. It is not a scanning dashboard and does not provide compliance scoring or issue drill-down for web/app defects. For agencies that need issue search, filtering, trends, and drill-down capabilities for web content, those features are provided by the scanning/monitoring tool the agency uses (for example, Pope Tech, Siteimprove, or Monsido). Converge can export assessment results and scan results into formats that support the agency’s remediation workflow (for example, Excel/CSV for import into Jira, ServiceNow, or other ticketing systems).
- **Assigning, tracking, and verifying remediation tasks.** Converge supports remediation workflows in the way agencies actually work. We can:
 - Provide findings as an issue log that can be imported into the agency’s ticketing tool.
 - Separate vendor/platform defects from agency content/configuration issues so work routes to the right owner.
 - Provide backlog development and acceptance criteria under *118-3.01 Remediation Planning and Backlog Development*.
 - Provide implementation guidance and working sessions under *118-3.02 Design/UX and Front-End Implementation Support*.

- Provide verification and regression testing under *118-1.06 Verification and Regression Testing*.
- **Order history, engagement history, and online access to invoices/contracts/reports.** Converge delivers reports and issue logs electronically (Word, Excel, PDF, or exports as requested) and can provide consolidated engagement records upon request (SOWs, deliverables, and invoices). If the agency uses a platform (training site, WebAlign, or scanning tool), that platform retains its own usage history and outputs. Converge does not require agencies to retrieve contracts or reports from a Converge-only online account.
- **Integrations, punch-out, and single sign-on.** Converge’s professional services do not require punch-out or SSO because most services are delivered through reports, working sessions, and the agency’s own tools. For subscription platforms (training platform and WebAlign), standard login is supported and Converge can coordinate with agencies that require SSO. For scanning platforms (such as Pope Tech), SSO or purchasing-system integrations would be handled through the platform vendor’s capabilities. Pope Tech currently supports SAML 2.0. When SSO or similar integrations are required, implementation depends on the agency’s identity provider and the platform’s supported methods; typical setup is measured in weeks once the right agency IT/security staff and vendor resources are engaged.
- **Minimum engagement thresholds and support for small entities.** Converge does not impose minimum professional services hours or minimum contract commitments under this cooperative contract. Agencies can start small with fixed-price use case testing, limited-scope assessments, per-seat training, small scanning tiers (when applicable), or targeted office hours. As needs grow, agencies can scale up through phased assessments, roadmap work, and governance support without changing vendors or restarting the program.

2.3 Monitoring, Changes & Issue Handling

- *Describe your ability to monitor ongoing work, including:*
 - *Tracking open assessments, remediation items, and training activities*
 - *Providing status updates and dashboards for both technical and non-technical stakeholders*
- *Describe how you manage change requests, expansion to new sites/apps, or scope adjustments over the term of the contract.*

Converge can monitor ongoing work in a straightforward way that fits how each agency already operates. We do not require PPAs to adopt a Converge tracking system. Instead, we track work internally and mirror status in the agency’s preferred tools (ticketing system,

shared tracker, or spreadsheet). This makes it easy for both technical staff and leadership to see what is in progress, what is blocked, and what is complete.

- **Tracking open assessments, remediation items, and training activities.**
 - **Assessments (audits and use case testing):** We track what is in scope (sites/apps, pages/workflows, environments), what stage the work is in (scoping, testing, reporting, review), what is pending from the agency (access, credentials, SME input), and expected delivery dates. We can share this status in a simple tracker or in the agency’s preferred tool.
 - **Remediation items and verification:** Remediation is typically tracked in the agency’s existing workflow (vendor tickets, internal backlog, or a shared spreadsheet). Converge supports that workflow by providing issue logs in an import-friendly format and by clearly separating vendor/platform defects from agency content/configuration issues. When Converge is asked to verify fixes under *118-1.06 Verification and Regression Testing*, we track what was re-tested and provide an updated pass/fail status list.
 - **Training activities:** For training and WebAlign subscriptions, we track access provisioning (who has access), support requests (login/access issues), and, where available, usage/completion indicators supported by the platform. For live sessions and office hours under *118-4.06 Office Hours and Coaching*, we track what sessions occurred, what topics were covered, and any follow-up items agreed with the agency.
- **Status updates and “dashboards” for technical and non-technical stakeholders.** Converge provides status in the level of detail each audience needs. Technical teams get actionable detail (what was tested, what failed, what changed, what is next). Non-technical stakeholders get a clear view of progress and risk (what is complete, what is in progress, major blockers, and trend direction). When an agency uses a platform that has dashboards (for example, a scanning tool), we use those views. Otherwise, Converge provides a simple written status summary and a short tracker table that shows progress by site/app, priority, owner (vendor vs. agency), and current state.
- **Change requests, new sites/apps, and scope adjustments.** Over the contract term, agencies often need to add a new site/app, expand to new workflows, adjust testing priorities, increase scanning scope, or change training volume. Converge handles changes through a short written request (email is fine) that states what is changing, why it matters, and when it is needed. We respond with: (1) the updated scope, (2) any delivery expectations, and (3) pricing under the applicable Product/Service IDs (or time-and-materials where appropriate). This keeps changes

transparent, prevents scope drift, and allows agencies to scale services up or down without a heavy change-control process.

2.4 Payment & Invoicing

- *Describe your standard invoicing and payment terms, including any quick-pay or early-payment discounts.*
- *Identify the forms of payment you accept, including but not limited to:*
 - *Purchase orders.*
 - *Procurement cards.*
 - *Credit/debit cards and ACH.*
- *Identify any additional fees associated with specific payment methods (e.g., credit card convenience fees).*

Invoicing and payment terms. Converge invoices based on the agency's purchase order and/or statement of work. Our standard payment term is Net 30, unless the agency requires different terms. Fixed-fee work is typically invoiced per the agreed milestone schedule. Time-and-materials work is typically invoiced monthly and includes clear detail on hours worked and the work performed. Subscription services (for example, training or WebAlign access, and any third-party subscriptions purchased through Converge) are invoiced on the subscription cycle selected (annual or monthly, as applicable). Converge does not offer quick-pay or early-payment discounts unless specifically requested and approved in writing.

Converge does not anticipate increasing prices for at least the first five years of the contract. If a price adjustment is ever required (including for third-party partner costs such as Continual Engine or Pope Tech), any increase will be limited to an agreed published index (e.g., CPI) and will be communicated in advance.

- **Forms of payment accepted.** Converge accepts the following payment methods, subject to the agency's policies:
 - Purchase orders (POs)
 - ACH / electronic payment
 - Procurement cards
 - Credit/debit cards

Additional fees by payment method. Converge does not add convenience fees for standard payment methods. If a third-party processing fee would apply based on an agency's chosen payment method, Converge will disclose it in advance and will only invoice it if permitted by the agency's policy.

2.5 Service Delivery, Timelines & SLAs

- *Describe how you propose to deliver services nationally, including how you support agencies across time zones and with varying technical maturity.*
- *Describe your ability to scale for large portfolios (e.g., state-wide or multi-agency implementations) while also supporting smaller entities.*
- *Describe your standard and proposed Service Level Agreements (SLAs) for:*
 - *Response times for critical and non-critical issues.*
 - *Resolution/mitigation targets for critical accessibility problems.*
 - *Platform uptime/availability, maintenance windows, and incident communications.*

Service level commitments (SLAs) and platform availability

These service levels apply to Converge’s professional services and any Converge-hosted portals used to support delivery (e.g., training access and WebAlign). They do not apply to agency systems or separately licensed third-party platforms (e.g., Pope Tech or Continual Engine), which are governed by those vendors’ terms. When an agency’s security requirements affect access (for example, logins or multi-factor authentication), Converge coordinates access early so timelines stay predictable.

- **Response times (professional services and support):**
 - **Critical requests** (e.g., barriers blocking a major public service, urgent compliance deadlines, production issues affecting deliverables): Converge responds within **one business day** and will schedule a same-day working session when needed. Because Converge is owner-led, agencies can reach senior decision-makers directly.
 - **Non-critical requests** (e.g., scheduling, routine questions): Converge responds within **two business days**.
 - **Corrections to Converge deliverables** (e.g., material errors, clarification edits): typically within **three business days**, sooner if urgent.
- **Resolution / mitigation for critical accessibility problems:** Converge does not guarantee a fixed “time to fix” because remediation depends on agency and/or vendor development cycles. For critical barriers, Converge supports rapid mitigation by confirming and documenting the issue, outlining practical fix options and interim alternatives, routing work to the correct owner (vendor vs. agency), and verifying fixes promptly once deployed.
- **Converge-hosted portal uptime and incident communications:** For verified outages attributable to Converge’s hosted environment, Converge will begin remediation immediately and will target restoration within **one business day** whenever feasible. Planned maintenance is scheduled outside business hours

when possible with advance notice. If a Converge-hosted subscription service is unavailable due to a verified Converge-attributable outage, Converge will provide a **prorated credit/refund** for the verified period of unavailability.

- **Third-party platforms (Pope Tech and Continual Engine):** These vendors control hosting and uptime for their platforms. Converge will facilitate support requests and escalation and keep the agency informed but cannot independently guarantee third-party uptime or resolution timelines. Pope Tech is cloud-hosted and does not support on-prem deployment; it has historically maintained a 99.9% uptime.

2.6 Problem Escalation, Warranty & Support

- *Describe your problem escalation process, including escalation paths, communication expectations, and how you coordinate with agency staff to resolve issues*
- *Describe your warranty and rework policies for services and deliverables (e.g., if remediation guidance is later found inadequate, how it is corrected and at what cost)*
- *Describe how you provide support resources such as knowledge bases, help centers, and technical documentation for any portals, tools, or processes used to support your service delivery.*

Problem escalation and communication. Converge keeps escalation simple and fast. Each agency has a primary point of contact for day-to-day coordination, but agencies can also reach Converge leadership directly when an issue is urgent. We set clear communication expectations at kickoff (who to contact, preferred channels, and who receives status updates). For urgent issues, we coordinate quickly with agency staff to confirm impact, identify the owner (agency vs. vendor), agree on the next step, and set a short check-in cadence until the issue is resolved or mitigated. If the blocker is access (for example, waiting on credentials or a security approval), we flag it immediately and propose a simple workaround (such as a staging link, a test account, or a guided screen-share) so work can continue.

Escalation path.

- **Level 1:** Team member responsible for delivery (day-to-day questions, clarifications, scheduling).
- **Level 2:** Converge leadership (scope, risk decisions, timeline concerns, urgent escalation).
- **Third-party escalation:** If an issue involves a third-party platform or partner (e.g., Pope Tech or Continual Engine), Converge coordinates the escalation with the vendor, tracks status, and keeps the agency informed on next steps.

Warranty and rework policy for deliverables. Converge stands behind the quality of its deliverables. If a Converge deliverable contains a material error (for example, incorrect reproduction steps, an incorrect standard reference, or remediation guidance that is not workable as written), Converge will correct and reissue the deliverable at no additional cost. If the agency changes the underlying system after delivery (new releases, new templates/components, platform upgrades, or significant content changes) or expands scope beyond what was reviewed, follow-up work is handled as new scope under the applicable Product/Service IDs or on a time-and-materials basis.

Support resources and documentation. Converge designs deliverables so agencies can act on them without extra translation. Reports include clear reproduction steps, evidence (such as screenshots), priority based on user impact, and practical remediation guidance. When services include a platform (e.g., training access or WebAlign), Converge provides basic “how to access and use” instructions and supports account/access issues. For third-party platforms (e.g., Pope Tech), the primary knowledge base and technical documentation are maintained by the platform vendor; Converge helps agencies locate the right references, interpret outputs, and route support requests when needed. In addition, users will have access to Pope Tech’s online help center (<https://app.pope.tech/help-center>).

2.7 Cooperative Administration & Reporting

- *Describe how your company will work with AFI and Edge Public to market and promote the awarded contract to eligible entities nationally. How will your team differentiate this contract from other cooperative or state contracts you may hold?*

Because Converge’s principals have been recognized as leading thought leaders in digital accessibility for over two decades, we occupy a unique position among digital accessibility firms. Converge will work with AFI and Edge Public to promote the awarded contract nationally through channels that already reach the people responsible for ADA compliance and digital accessibility in state and local government. We are uniquely positioned to do this because we are not just a vendor—we are embedded in the national accessibility community that public agencies rely on for practical guidance.

For more than a decade, Converge has presented and exhibited at conferences that draw ADA leadership and public-sector accessibility teams, including CSUN, the National ADA Symposium, NAADAC, PacRim, and Accessing Higher Ground. We will actively use these events to promote the AFI/Edge Public cooperative contract as the simplest and fastest way for eligible entities to engage Converge. When we present or exhibit, we can share Converge’s Product/Service IDs, explain how agencies can use them, and remind agencies

that the AFI/Edge Public contract provides a clear, pre-approved path to purchase services quickly.

We also publish a widely read public-sector-focused blog on digital accessibility and legal requirements, which provides an ongoing channel to educate agencies on how to purchase and use services under the AFI/Edge Public cooperative contract. In addition, Converge maintains long-standing relationships with conference leadership and would be happy to introduce AFI/Edge Public to the marketing and communications leaders at these organizations to support joint outreach (for example, co-branded sessions, webinars, and conference promotions). Ken Nakata is also a founding member, former board member, and current Certification Committee member of the International Association of Accessibility Professionals (IAAP) and would be glad to collaborate with AFI/Edge Public on outreach through IAAP and at the annual mEnabling conference.

Converge holds no other national cooperative contracts. Apart from limited “piggyback” contracts within Colorado based on our work with local governments, this AFI/Edge Public contract would be our primary national cooperative vehicle. That is an advantage for AFI and Edge Public: we can consistently point public agencies to this contract as the preferred way to engage Converge, rather than splitting attention across multiple competing cooperative agreements. Agencies often seek Converge out because our services are highly tailored to how each government works and to the real-world legal and operational risks they face. This contract will make it easier for those agencies to engage Converge quickly under a clear, standard set of Product/Service IDs, while still receiving services that are customized to their structure, vendors, and priorities.

We will differentiate this contract by emphasizing a modular catalog of clearly defined Product/Service IDs across all seven workstreams (assessments/audits, roadmaps/advisory, remediation planning and implementation support, training, governance/procurement, document/PDF services, and multimedia consulting), delivered in a way that fits agency tools and workflows rather than forcing a proprietary process. The contract will be positioned as a straightforward way for agencies of any size to start where they are, make measurable progress, and scale over time—without unnecessary disruption.

We look forward to coordinating with AFI/Edge Public on promotional opportunities and a joint outreach plan upon contract award.

- *Describe how customers can verify they are receiving the correct contract pricing and terms (e.g., contract IDs, portal indicators, contract-specific quotes)*

Converge will make it easy for agencies to confirm they are receiving the correct AFI/Edge Public contract pricing and terms. Every quote will clearly state that it is issued under the AFI/Edge Public cooperative contract (including the contract name and ID, as provided by AFI/Edge Public) and will list the specific 118- Product/Service ID(s), quantities/units, and prices taken directly from the contract pricing tables. Any statement of work will repeat the same contract reference and the applicable 118- Product/Service IDs. Invoices will also include the contract reference and 118- Product/Service IDs so agencies can match what they were billed to what they purchased.

If a purchase includes a third-party subscription or third-party remediation service (such as Pope Tech or Continual Engine), the quote will identify the specific subscription tier and any related onboarding or managed service IDs so agencies can verify exactly what is included.

- *Describe your ability to provide quarterly sales and usage reports showing total gross dollar volume generated from this contract, including breakdowns by:*
 - *Participating agency.*
 - *State/region.*
 - *Major service categories or products.*

Converge can provide quarterly sales and usage reports showing the total gross dollar volume generated under this contract, with breakdowns by (1) participating agency, (2) state/region, and (3) major service categories or products. Reports will be delivered in Excel or CSV format and aligned to AFI/Edge Public’s required reporting template, including Exhibit H (Sample Reporting), or any updated format AFI specifies. We can also include supporting detail (such as 118- Product/Service ID, quantity, and dollar amount) so AFI can confirm that purchases match contract pricing. We can also submit the required monthly contract sales reports, including zero-activity reports when applicable.

Other Contract Objectives

Converge supports AFI/Edge Public’s contract objectives in the following practical ways:

- **Easy to buy and use:** Agencies can purchase clearly defined Product/Service IDs without buying a bundled “suite,” and we work in the agency’s existing tools and workflows.
- **Works for agencies of any size:** Agencies can start small (fixed-price options, limited training seats, targeted support) and scale up without changing vendors or restarting.
- **National delivery, low disruption:** Most work is remote across time zones; on-site support is available when needed with reasonable notice and pre-approved travel.

- **Fits real government environments:** We can operate with restricted access (logins/MFA, limited permissions) and still produce clear, usable deliverables.
- **Accountability and reporting:** We provide clear routing of issues (vendor vs. agency responsibility) and contract-friendly reporting (including quarterly sales/usage by agency, region, and category).
- **Contract promotion:** We will actively help market the contract through public-sector channels (conferences, webinars, and Converge's public-sector-focused publications).