



Word Wizards[®] inc.

508 compliance
transcription
graphic design

Response to
Alliance for Innovation (AFI)
RFP AFI-2025-118

ADA Digital Accessibility

WCAG 2.1 AA / 2.2 AA Compliance Services

Workstreams 2, 3, 4, 6, and 7

Tab 3: Performance Capability

Submitted by

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Tab 3: Performance Capability

EVALUATION SECTION 2: PERFORMANCE CAPABILITY

Section 2.1: Overall Customer Experience & Program Delivery

Consulting Approach and Methodology

Word Wizards' consulting methodology is grounded in practical expertise developed through decades of hands-on accessibility work. We emphasize actionable guidance that produces real results, specific recommendations that agency staff can implement immediately to improve accessibility outcomes.

Phase 1: Discovery and Onboarding

The foundation of every successful accessibility engagement is a thorough understanding of the agency's current state, goals, constraints, and internal workflows. Word Wizards invests significant effort in the discovery phase to ensure our remediation program aligns precisely with agency needs and delivers measurable results.

Dedicated Project Management

Upon contract initiation, Word Wizards assigns a dedicated Project Manager who serves as the agency's primary point of contact throughout the engagement. This individual is responsible for coordinating all activities, managing timelines, facilitating communication between agency staff and our production teams, and ensuring that deliverables meet or exceed expectations. Our Project Managers have deep experience with federal and state accessibility requirements and understand the unique challenges facing public sector organizations.

The assigned Project Manager will:

- **Serve as single point of contact:** Agencies never navigate a phone tree or submit tickets into a queue. Direct access to your Project Manager via phone, email, and video conference ensures rapid response to questions and concerns.
- **Coordinate internal resources:** Our Project Manager mobilizes the appropriate remediation specialists, quality assurance reviewers, and subject matter experts based on document complexity and content domain.
- **Manage timeline and milestones:** Using our internal tracking system, the Project Manager monitors progress against agreed schedules and proactively communicates any adjustments.
- **Facilitate knowledge transfer:** For agencies building internal accessibility capacity, our Project Manager connects staff with training resources and consultation opportunities.

Discovery Meeting and Intake Assessment

Within the first week of engagement, we conduct a comprehensive discovery meeting with agency stakeholders. This meeting establishes the foundation for a successful partnership by addressing:

- **Accessibility goals and priorities:** We discuss the agency's compliance objectives, including specific DOJ deadlines, any existing settlement agreements or audit findings, and the relative priority of different content.
- **Current consulting / training / services needed:** We gather information about the volume, types, and locations of documents or videos requiring remediation and the consulting goals of the client. This includes content hosted on websites, content management systems, document repositories, internal networks, and any third-party platforms hosting agency content.
- **Internal workflows and stakeholders:** Understanding who creates, approves, and publishes documents and videos to help us identify opportunities to integrate accessibility into existing processes and determine the appropriate points of contact for different document types.
- **Technical environment:** We assess the agency's technology infrastructure, including content management systems, document authoring tools, and any existing accessibility testing capabilities.
- **Budget and resource constraints:** Honest discussion of available funding and staff resources allows us to recommend the most effective service configuration.

Secure File Transfer and System Configuration

Word Wizards establishes secure channels for document exchange that meet federal security requirements. Our standard options include:

- **In-house Secure FTP Server:** Our dedicated FTP server provides encrypted file transfer for routine document exchange. This is our primary delivery mechanism for most federal agency clients, including HHS, SBA, and OPM-OIG.
- **Agency-provided secure systems:** We readily integrate with agency-specified transfer systems.
- **Encrypted email:** For smaller deliveries and time-sensitive communications, we support encrypted email transmission.

During onboarding, we also configure our internal tracking systems to align with agency requirements. Each project is logged with unique identifiers that enable detailed reporting by document type, complexity tier, turnaround time, and compliance status.

Phase 2: Assessment and Roadmap

For large-scale engagements and agencies with substantial document inventories, Word Wizards provides comprehensive assessment services to inform remediation planning and resource allocation.

Remediation Content Inventory and Classification

Our assessment process begins with a systematic review of the agency's content portfolio. We categorize content by:

- **Documents, Forms, Videos:** What content requires compliance and what platform will it be delivered to the end user.
- **Complexity tier:** We evaluate each document or video based to determine overall effort required for compliance.

- **Public visibility and risk profile:** Content can be prioritized based on public-facing exposure, agency mission importance, and potential legal risk. High-visibility content on agency websites receives priority attention.
- **Automation Enhanced (AE) Workflow Suitability:** Based on complexity and compliance requirements, we recommend manual remediation or AE processing for each document category and or confirm audio description / AI assisted captioning workflows are appropriate.

Cost Estimation and Budget Planning

Once we understand the scope of a batch of documents, forms, or videos, we produce an estimate of cost based on standard rates. Estimates and budgets are shared with the client for final approval before the work begins.

Needs Roadmap Development

Based on assessment findings, we develop a comprehensive roadmap that includes:

- **Phased implementation schedule:** Deadlines and priorities for objectives.
- **Resource allocation plan:** We identify the consultants, remediation specialists, subject matter experts, and quality assurance resources required for each phase.
- **Milestone and deliverable schedule:** Clear checkpoints allow agencies to track progress and verify that work is proceeding according to plan.
- **Risk mitigation strategies:** We identify potential challenges (e.g., source file availability, complex technical content) and develop contingency approaches.

Phase 3: Remediation, Training, and Monitoring

Word Wizards' remediation process reflects over four decades of experience making documents accessible for federal agencies and state and local governments. Our structured workflow ensures consistent quality, reliable timelines, and full compliance with applicable standards.

Workstream 2: Program Roadmaps, Strategy & Ongoing Advisory

Word Wizards provides strategic consulting and ongoing advisory services to support agencies in planning, sequencing, and managing accessibility initiatives over time. Our approach ensures that accessibility efforts are sustainable, properly resourced, and aligned with agency priorities and compliance deadlines.

Strategic Roadmap Development

Word Wizards develops comprehensive multi-phase accessibility roadmaps tailored to each agency's unique circumstances, resources, and compliance objectives. Our roadmap development process includes:

- **Current State Assessment:** Comprehensive evaluation of existing accessibility posture, including document inventories, content production workflows, staff capabilities, and technology infrastructure.
- **Prioritization Framework:** Systematic prioritization of properties, content types, and user journeys based on risk profile, public visibility, mission criticality, and compliance impact.

- **Phased Implementation Planning:** Development of realistic, achievable implementation phases aligned with DOJ compliance deadlines, budget cycles, and organizational capacity.
- **Resource and Budget Planning:** Advisory support for budget planning, staffing requirements, vendor management strategies, and resource allocation across accessibility initiatives.

Ongoing Advisory Services

Word Wizards provides continuous advisory support to ensure accessibility programs remain on track and responsive to evolving needs:

- **Periodic Progress Reviews:** Quarterly or semi-annual review sessions to assess program progress, evaluate outcomes against objectives, and identify areas requiring adjustment.
- **Roadmap Adjustments:** Responsive modifications to implementation plans based on changing priorities, emerging requirements, budget fluctuations, or lessons learned from completed phases.
- **Champion and Committee Coaching:** Support for internal accessibility champions and steering committees, including guidance on effective governance practices, stakeholder engagement strategies, and program advocacy.
- **Status Reporting:** Preparation of status dashboards and advisory memos suitable for leadership briefings, board presentations, and compliance documentation.

Deliverables

Workstream 2 deliverables may include written roadmaps, phased implementation plans, prioritization matrices, status dashboards (in report form), and advisory memos tailored to technical, business, and policy stakeholders.

Workstream 3: Remediation Planning, Design & Implementation Support

Word Wizards provides remediation planning, design guidance, and implementation support to help agencies and their development, UX, content, and vendor teams address accessibility barriers systematically. Our focus is on providing expert direction that enables agencies to achieve and maintain compliance through their own internal resources and processes.

Remediation Planning Services

Word Wizards develops comprehensive remediation plans that translate assessment findings into actionable work:

- **Remediation Backlogs:** Development of prioritized remediation backlogs based on assessment findings, categorized by severity, effort, and impact to enable efficient sprint planning and resource allocation.
- **Issue Documentation:** Detailed documentation of each accessibility issue, including the specific WCAG success criterion violated, affected user groups, steps to reproduce, and recommended remediation approaches.
- **Effort Estimation:** Realistic effort estimates for remediation tasks to support project planning, budget allocation, and timeline development.

Design and UX Guidance

Word Wizards provides design and user experience recommendations that help agencies build accessibility into their digital properties from the ground up:

- **Accessible Design Patterns:** Recommendations for accessible page templates, UI components, and interaction patterns that meet WCAG requirements while supporting agency design goals.

Implementation Support

Word Wizards supports agency teams through the remediation implementation process:

- **Working Sessions:** Collaborative working sessions with agency IT, product, and vendor teams to guide remediation efforts, answer technical questions, and troubleshoot implementation challenges.
- **Verification Testing:** Validation services to confirm that implemented remediation work successfully addresses identified accessibility issues and meets WCAG conformance requirements.
- **Before/After Documentation:** Preparation of validation summaries documenting the accessibility state before and after remediation, demonstrating compliance progress for audit and reporting purposes.

Deliverables

Workstream 3 deliverables may include remediation plans, design specifications, annotated wireframes or mockups, and before/after validation summaries.

Workstream 4: Training, Education, and Capacity Building

Training Services Delivery Workflow

In addition to document remediation and multimedia accessibility services, Word Wizards delivers comprehensive training and education services following a structured workflow designed to build lasting organizational capacity. Our training delivery process ensures agencies receive content tailored to their specific needs and audiences.

Training Needs Assessment

Every training engagement begins with a collaborative needs assessment. Word Wizards works with agency stakeholders to identify the subject matter clients wish to receive training on, the target audiences who will participate, and the learning outcomes required for success. We assess current staff knowledge levels, existing accessibility challenges, and organizational goals to design curriculum that addresses genuine gaps and builds practical skills.

Curriculum Development

Based on the needs assessment, Word Wizards develops straightforward educational content focusing on required technical information and practical means for success. Our curriculum addresses three primary audience segments:

- **Stakeholders and Decision Makers:** Education on regulatory criteria including WCAG 2.x requirements, ADA Title II obligations, Section 508 standards, and DOJ compliance

deadlines. Strategic content helps leadership understand risk, prioritize investments, and support organizational accessibility initiatives.

- **Content Producers:** Hands-on training for staff creating documents, forms, or videos. Topics include accessible authoring techniques in Microsoft Office applications, proper document structure, image descriptions, color contrast requirements, and accessible form design.
- **Technical Staff:** In-depth training on accessibility remediation technologies, strategies, and best practices. Content covers PDF tagging, assistive technology testing, evaluation tools, and remediation workflows for agencies developing internal accessibility capacity.

Flexible Delivery Options

Word Wizards delivers training through multiple formats based on agency preferences and requirements. Curriculum can be provided as blocks of individual modules per topic for targeted skill-building, or as longer segments of extended training in webinar format for comprehensive coverage. We offer client-requested material formats including:

- **Live Webinars:** Interactive instructor-led sessions with real-time Q&A, demonstrations, and practical exercises.
- **Pre-Recorded Videos:** Self-paced video modules for on-demand learning, suitable for integration into agency training programs or learning management systems.
- **Slide Presentations:** Accessible presentation materials that agencies can use for internal training delivery and knowledge cascading.
- **PDF Reference Sheets and Tip Sheets:** Quick-reference guides for day-to-day use by content creators and technical staff.
- **Multi-Channel Versions:** Content formatted for various distribution platforms to maximize reach and accessibility within the organization.

All training deliverables are produced to full accessibility standards, demonstrating the principles being taught and providing models that agencies can reference for their own content creation.

Workstream 6: Document & PDF Accessibility Services

Word Wizards delivers comprehensive document and PDF accessibility remediation services through a structured engagement process designed to ensure quality, transparency, and accountability from initial contact through final delivery. Our approach combines rigorous project management with deep technical expertise to produce consistently compliant, usable documents.

Project Engagement Workflow

Every document remediation engagement follows a defined workflow that ensures clear communication, predictable timelines, and successful outcomes:

- **Engagement Initiation:** Agencies initiate document remediation requests via email to their assigned Project Manager, through our secure FTP portal, or by phone. For new agencies, we conduct a brief orientation call to establish communication preferences, explain our workflow, and configure secure file transfer access.
- **Scope Definition and Quoting:** Upon receiving documents, our Project Manager reviews the submission to understand scope, complexity, and any special requirements.

Within one business day, agencies receive a written quote detailing the complexity tier classification, page count, estimated cost based on published rates, and projected delivery timeline. Agencies approve the quote before work begins.

- **Production Assignment:** Once approved, the Project Manager assigns the document to appropriate remediation specialists based on content complexity, subject matter expertise requirements, and current workload distribution. Rush requests are flagged and prioritized accordingly.
- **Progress Communication:** For standard projects, agencies receive confirmation when production begins and notification upon completion. For large or complex engagements, we provide interim status updates at agreed intervals. Agencies can request status updates at any time by contacting their Project Manager.
- **Delivery and Acceptance:** Completed documents are delivered via the agency's preferred secure transfer method along with a compliance certificate documenting the standards met. Agencies have the opportunity to review deliverables and request any necessary adjustments at no additional charge within the acceptance period.
- **Invoicing and Close-Out:** Following acceptance, invoices are submitted according to agency billing procedures. Project documentation is archived for future reference and audit support.

Full-Service Expert Remediation: Technical Workflow

For documents requiring guaranteed 100% compliance, our comprehensive technical workflow includes the following steps:

- STEP 1. **Document Intake and Logging:** Upon email notification from the agency, our Project Manager logs the request in our internal tracking system, assigns a unique project identifier, and acknowledges receipt within one business day.
- STEP 2. **Technical Assessment:** Senior remediators evaluate source files to determine complexity tier, identify potential challenges, and confirm the estimated timeline and cost.
- STEP 3. **Source File Preparation:** If necessary, we convert legacy formats, apply OCR to scanned documents, or request higher-quality source materials from the agency.
- STEP 4. **Structural Tagging:** Trained specialists apply proper tag structure including headings, paragraphs, lists, tables, and reading order. We use multiple industry-standard checklists: WCAG 2.2, PAC3, CommonLook PDF, and any agency-specific requirements.
- STEP 5. **Alternative Text Development:** Images, charts, graphs, and diagrams receive appropriate alternative text. Simple images receive concise descriptions; complex visual data receives two-part alternatives with short phrases plus detailed long descriptions.
- STEP 6. **Table Remediation:** Tables are properly structured with headers associated with data cells. Complex tables with merged cells or multi-layered structures receive particular attention to ensure screen reader navigability.
- STEP 7. **Form Accessibility:** Interactive forms receive field labels, help text (tooltips), logical tab order, and appropriate scripting for validation and calculations.
- STEP 8. **Color Contrast Verification:** We verify that all text meets WCAG 2.1 AA color contrast requirements and remediate source files when necessary.
- STEP 9. **Metadata and Properties:** Document title, language, and other metadata properties are configured for accessibility tool compatibility.

STEP 10. **First-Level Quality Assurance:** A second remediation specialist reviews all work against compliance checklists and verifies structural accuracy.

STEP 11. **Screen Reader Testing:** We test all deliverables with industry-standard screen readers (JAWS and NVDA) to verify real-world usability, not just technical compliance.

STEP 12. **Final Review and Delivery:** Senior remediators perform final compliance certification. Completed documents and compliance reports are uploaded to the agency's secure transfer system.

Our overall mission in making documents accessible is not only to fulfill checklists based on accessibility criteria but to make sure they are usable to the end user. Sometimes this requires creativity with tagging. We have developed our own in-house processes, sanctioned by many government agency 508 compliance auditors.

Automation-Enhanced (AE) Processing Workflow

For large batches of archival content where cost efficiency is paramount, our automation-enhanced workflow leverages the Accessibility On-Demand (AoD) platform:

STEP 1. **Batch Intake and Configuration:** Documents are uploaded to the AoD platform in bulk. Our team configures processing parameters based on document characteristics and agency requirements.

STEP 2. **Automated Processing:** The platform applies industry-leading OCR, auto-tagging of document structure, logical reading order establishment, language tagging, metadata assignment, and bookmark generation. Thousands of files can be processed simultaneously.

STEP 3. **AI-Powered Alternative Text:** The platform generates contextual alternative text for images using advanced generative AI. Documents with limited visual content easily pass all checker requirements and human validation can be provided for more complex material.

STEP 4. **Human Validation:** Unlike pure automation solutions, AE deliverables receive human expert review. Our remediation specialists validate automated results, and ensure the final product meets a 95% compliance threshold.

STEP 5. **Quality Assurance and Delivery:** Validated documents undergo compliance assessment against PDF/UA and WCAG 2.1 Level AA standards before delivery to the agency.

AE processing workflows achieves significant cost savings compared to full manual remediation while maintaining quality standards. For documents requiring 100% compliance guarantee, agencies can escalate selected AE deliverables to manual remediation for additional expert review and remediation for additional labor hours.

Document Remediation Quality Standards

All document remediation deliverables meet or exceed the following quality standards:

- **Compliance Standards:** Full conformance with WCAG 2.1 AA / 2.2 AA, Section 508, and PDF/UA standards as applicable.
- **Assistive Technology Validation:** Screen reader testing with JAWS and NVDA to verify real-world usability for end users.
- **Dual-Layer Quality Assurance:** Every document under manual remediation receives review by both the primary remediator and an independent QA specialist before delivery.
- **Compliance Documentation:** Each deliverable includes a compliance certificate documenting the standards met and testing performed.

Workstream 7: Video, Audio & Multimedia Accessibility

Word Wizards delivers comprehensive multimedia accessibility services including captioning, transcription, and audio description. Our structured engagement process ensures agencies receive high-quality, compliant deliverables with clear communication and predictable timelines throughout the project lifecycle.

Project Engagement Workflow

Every multimedia accessibility engagement follows a defined workflow from initial request through final delivery:

- **Engagement Initiation:** Agencies submit video files via our secure SFTP system, provide streaming URLs, or grant access credentials to hosted video platforms. For new agencies, we conduct an orientation call to establish secure access, explain service options (captioning, transcription, audio description), and confirm delivery format preferences.
- **Scope Definition and Quoting:** Upon receiving video content, our Project Manager reviews the submission to assess total runtime, content complexity (number of speakers, technical terminology, audio quality), and required services. Within one business day, agencies receive a written quote detailing per-minute rates, total estimated cost, and projected delivery timeline. Agencies approve the quote before production begins.
- **Production Assignment:** Once approved, the Project Manager assigns the video to appropriate specialists based on service type, content complexity, and subject matter expertise requirements. Captioning, transcription, and audio description may be processed in parallel or sequentially depending on project requirements.
- **Progress Communication:** Agencies receive confirmation when production begins and notification upon completion. For large video libraries or complex projects, we provide interim status updates at agreed intervals. Agencies can request status updates at any time by contacting their Project Manager.
- **Delivery and Acceptance:** Completed caption files, transcripts, and audio description tracks are delivered in the agency's required format(s) via secure transfer. Deliverables include a summary documenting compliance with applicable standards. Agencies have the opportunity to review deliverables and request any necessary corrections.
- **Platform Integration Support:** Word Wizards provides guidance on integrating caption files and audio description tracks with agency video platforms, including YouTube, Vimeo, and proprietary content management systems.

Captioning Services: Technical Workflow

Word Wizards' captioning services follow a human-hybrid workflow that ensures WCAG compliance while maintaining cost-effectiveness and rapid turnaround. Our technical process includes:

- STEP 1. **File Intake:** Agency uploads video files to Word Wizards' secure SFTP system or provides access credentials to hosted video platforms. Files are logged into our tracking system with associated metadata including title, duration, source location, and priority level.
- STEP 2. **Human Transcription:** U.S.-based transcription specialists create verbatim transcripts of all audio content. This human-performed transcription ensures accuracy for technical terminology, proper nouns, accented speech, and, critically, speaker identification. Our

transcriptionists identify speakers by name when known or by designation (Speaker 1, Speaker 2) when unknown, ensuring compliance with WCAG requirements for multi-speaker content.

- STEP 3. **AI-Assisted Timing Synchronization:** Once human specialists have validated the transcript text and speaker identification, AI performs precise timing synchronization, aligning each caption to the corresponding audio with frame-level accuracy. This automation step achieves timing precision that would be tedious and time-consuming through manual methods.
- STEP 4. **Compliance Review:** A human captioning compliance specialist reviews the synchronized caption file to verify WCAG conformance: accurate text, correct speaker identification, appropriate timing and duration, proper placement, and readability. Any issues identified during review are corrected before delivery.
- STEP 5. **Delivery and Integration:** Completed caption files are delivered in the agency's required format(s), SRT, VTT, SCC, or embedded, along with transcript documents. Word Wizards can provide guidance on integrating caption files with agency video platforms.

Captioning Quality Standards

All caption deliverables meet or exceed the following WCAG 2.1 AA requirements:

- 98%+ transcription accuracy for clearly audible speech
- Speaker identification for all multi-speaker content
- Proper indication of significant sound effects and music when relevant to content

Audio Description Services: Technical Workflow

Word Wizards provides audio description services using our proprietary SAIV (Synthetic AI Voice) technology, delivering descriptive narration at a fraction of traditional costs. Our technical workflow includes:

- STEP 1. **Visual Content Analysis:** Accessibility specialists review video content to identify visual elements essential to understanding that are not conveyed through existing audio. This includes on-screen text, charts and data visualizations, demonstrations, and other visual information that blind or low-vision viewers would need described.
- STEP 2. **Script Development:** Human specialists write audio description scripts that communicate essential visual content clearly and concisely. Scripts are crafted to fit within natural pauses in the existing audio, or, for extended audio description, at designated pause points. Our scriptwriters balance completeness with brevity, ensuring descriptions enhance rather than overwhelm the viewing experience.
- STEP 3. **SAIV Voice Generation:** Approved scripts are produced using SAIV, Word Wizards' proprietary synthetic AI voice technology. SAIV generates broadcast-quality narration that is virtually indistinguishable from human voice talent, with consistent tone and pacing across the description track. The client may select from our voice library to match the character, tone, and language appropriate for the content.
- STEP 4. **Timing and Integration:** Audio descriptions are precisely timed and integrated with the video. For standard audio description, narration is placed in natural pauses. For extended audio description (when visual content is too dense for natural pauses), the video pauses briefly to accommodate descriptions before resuming.
- STEP 5. **Quality Assurance:** Completed audio description tracks undergo review to verify accuracy, appropriate timing, audio quality, and overall effectiveness. Reviewers confirm that

descriptions accurately convey visual content without conflicting with existing dialogue or audio.

Phase 4: Ongoing Governance and Improvement

Accessibility compliance is not a one-time achievement but an ongoing commitment. Word Wizards supports agencies in establishing sustainable governance practices and continuous improvement processes.

Documentation and Compliance Reporting

Word Wizards maintains highly detailed documentation and reporting for all compliance operations under this contract. Our standard deliverables include:

- **Compliance certificates:** Each remediated document is accompanied by certification confirming conformance with applicable standards (WCAG 2.1 AA, PDF/UA, Section 508).
- **Detailed project reports:** Reports show pages processed, tier classifications, rates applied, deliverables provided, and compliance status for each document.
- **Aggregate portfolio analytics:** For large-scale engagements, we provide dashboard views of compliance status across the document portfolio, enabling agencies to track progress toward accessibility goals.
- **Audit-ready documentation:** Our records support agency responses to DOJ inquiries, OCR complaints, or internal audit requirements.

Periodic Review and Optimization

We periodically review engagement data to ensure ongoing compliance goals, timelines, and objectives are achieved. This includes:

- **Quarterly business reviews:** Scheduled meetings with agency stakeholders assess program performance, discuss emerging needs, and adjust service configuration as appropriate.
- **Process improvement analysis:** We use engagement data to identify areas for improvement in our production and quality control workflows throughout the life of the contract.
- **Track optimization recommendations:** As agencies gain experience with our dual-track model, we help refine the allocation between manual remediation and AE processing to maximize value.
- **Standards evolution monitoring:** We track evolving accessibility standards (including WCAG 2.2 and emerging WCAG 3.0 guidance) and advise agencies on implications for their compliance programs.

Pathway to Agency Self-Sufficiency

Word Wizards is committed to building agency capacity for sustained accessibility. Our engagement model supports a natural progression:

- **Phase 1 - Managed Services:** Agencies rely on Word Wizards for comprehensive remediation support while focusing on immediate compliance deadlines.

- **Phase 2 - Capacity Building, Training, and Consulting:** Through training and consultation, agency staff develop foundational accessibility skills for document authoring and basic remediation.
- **Phase 3 - Collaborative Production:** Agencies handle routine remediation internally while partnering with Word Wizards for complex content, quality assurance, and specialized expertise.
- **Phase 4 - Strategic Partnership:** Mature agencies maintain internal accessibility programs with Word Wizards providing consultation, training updates, overflow capacity, and specialized services.

This evolution pathway ensures that agencies build lasting accessibility capacity while maintaining access to expert support when needed.

Transition Support for Existing Members

For existing AFI or Edge Public members transitioning into our program under this cooperative contract, Word Wizards provides seamless onboarding:

- Expedited discovery meeting to understand current state and immediate needs
- Priority scheduling to address any urgent compliance deadlines
- Coordination with any existing accessibility vendors to ensure continuity
- Migration support for any in-progress work or historical documentation
- Immediate access to both manual remediation and AE service options

Our goal is to minimize disruption while rapidly delivering the quality, responsiveness, and expertise that Word Wizards is known for across our 35-year history serving government clients.

Client Onboarding Process: Transitioning New Agencies into the Word Wizards Workflow

Word Wizards has developed a structured, yet flexible onboarding process designed to ensure that new Participating Public Agencies experience a seamless transition into our workflow. Our goal is to establish a strong foundation for partnership from day one, aligning expectations, configuring secure systems, and empowering agency staff to engage our services efficiently and confidently.

Phase 1: Kickoff Meeting and Goals Alignment

Every new client relationship begins with a dedicated virtual kickoff meeting. This collaborative session brings together key stakeholders from both organizations to establish a shared understanding of the engagement.

Kickoff Meeting Agenda

| Topic | Discussion Points |
|-----------------------------|---|
| Agency Goals and Priorities | Compliance deadlines, high-priority document types, systems, and technologies. |
| Current State Assessment | Existing document inventory, known accessibility gaps, previous remediation efforts, document production pipeline |

| Topic | Discussion Points |
|-------------------------------|---|
| Scope and Volume Expectations | Anticipated document volume (monthly/quarterly), mix of document types, seasonality or peak periods, special events |
| Timeline and Milestones | Critical deadlines (e.g., DOJ compliance dates), phased rollout plans, reporting requirements |
| Success Metrics | How the agency will measure success, turnaround times, compliance rates, user feedback |

The kickoff meeting concludes with a documented summary of goals, agreed-upon priorities, and a preliminary project roadmap. This becomes the guiding reference for our ongoing partnership.

Phase 2: Secure File Transfer Configuration

Following the kickoff meeting, Word Wizards configures secure access to our file transfer infrastructure. Data security is paramount when handling government documents, and we ensure that all file exchanges occur through encrypted, access-controlled channels.

Secure Credentials Setup

| Feature | Description |
|------------------------------|---|
| Dedicated FTP/SFTP Folder | Each agency receives a dedicated folder on our secure server with unique login credentials. All transfers are encrypted using SSL/TLS protocols. |
| Access Control | Credentials are issued only to authorized agency personnel identified during onboarding. Access can be expanded or restricted as agency needs evolve. |
| 24/7 Availability | Our secure portal is available around the clock, enabling agencies to upload documents at their convenience, nights, weekends, or whenever workflow demands. |
| Alternative Transfer Methods | For agencies with specific security requirements, we accommodate agency-hosted secure portals, encrypted email for smaller files, or integration with approved cloud platforms. |

Agency IT or security personnel are welcome to review our security protocols and request documentation of our data handling practices during this phase.

Phase 3: Billing and Invoicing Procedures

Word Wizards works with each agency to establish billing and invoicing procedures that align with their procurement and accounts payable requirements. We understand that government agencies operate under strict financial controls, and we configure our processes to integrate smoothly with agency systems.

| Billing Setup Includes | |
|-----------------------------|--|
| Item | Details |
| Purchase Order Requirements | Confirmation of whether a standing PO, per-project PO, or blanket purchase agreement will be used |
| Invoice Format and Delivery | Customization of invoice format to include required fields (contract number, project codes, cost center allocations); delivery via email, mail, or electronic invoicing portal |
| Payment Terms | Confirmation of Net 30 terms or agency-specific payment cycles |
| Accepted Payment Methods | Setup for payment via check, ACH transfer, or procurement card (Visa, MasterCard accepted) |
| Billing Contact Designation | Identification of the appropriate agency contact for invoice delivery and payment inquiries |

We provide a sample invoice during onboarding so agencies can confirm the format meets their requirements before the first project is completed.

Phase 4: Points of Contact and Communication Protocols

Clear communication is essential to a successful partnership. During onboarding, we introduce agency staff to their dedicated Word Wizards team and establish the communication protocols that will govern our working relationship.

Your Word Wizards Team

| Role | Responsibility | Contact Method |
|------------------------------|--|-------------------------------|
| Project Manager | Day-to-day point of contact for project submissions, status updates, questions, and coordination | Direct phone, email |
| Production Team Lead | Technical questions regarding document remediation, accessibility standards, or deliverable specifications | Via Project Manager or direct |
| Account Executive | Contract matters, pricing questions, scope expansions, escalations | Direct phone, email |
| Executive Availability (CEO) | Senior escalation path for urgent or unresolved issues | Available upon request |

Communication Protocols

| Protocol | Commitment |
|--------------------|--|
| Response Time | All inquiries receive a response within 4 business hours; urgent matters are addressed immediately |
| Status Updates | Proactive updates provided at project milestones; agencies never have to wonder where their documents are in the process |
| Preferred Channels | We adapt to agency preferences, phone, email, video conference, or project management tools as desired |
| Escalation Path | Clear escalation procedures ensure that any concerns are addressed promptly at the appropriate level |

Phase 5: Ordering Process Orientation

The final phase of onboarding ensures that agency staff understand exactly how to engage Word Wizards for new services. We walk through the ordering process step-by-step, answer questions, and provide written documentation for future reference.

How to Order Services

| Step | Action | Details |
|------|--------------------------------|---|
| 1 | Submit Documents | Upload files to your secure FTP folder, send via encrypted email, or use your preferred transfer method |
| 2 | Provide Project Details | Include a brief description of the request, document type, target turnaround, any special instructions |
| 3 | Receive Confirmation | Your Project Manager acknowledges receipt, confirms scope and timeline, and provides a cost estimate if requested |
| 4 | Production and QA | Documents are remediated through our hybrid human-AI workflow, with dual-layer quality assurance and screen reader validation |
| 5 | Delivery and Review | Completed documents are returned via secure transfer with a compliance summary; agency reviews and requests any adjustments |
| 6 | Invoice and Close | Invoice issued per agreed billing procedures; project documented for future reference |

Section 2.2: Orders, Engagements & Online Functions

Engagement Initiation

Word Wizards offers flexible engagement models to accommodate diverse agency needs:

- **Email:** Primary contact for engagement requests is ilana@wordwizardsinc.com. Our team acknowledges receipt within one business day and provides estimated timelines based on project scope and complexity.
- **Phone:** Direct phone access to U.S.-based consultants is available during business hours (8:00 AM to 5:00 PM Eastern Time, Monday through Friday). Our main office number is 301.986.0808.
- **Video Conference:** For discovery meetings, planning sessions, training delivery, and consulting engagements, we offer video conferencing via Microsoft Teams, Zoom, or agency-preferred platforms.

Service Delivery Infrastructure

Word Wizards delivers consulting services primarily through remote/virtual platforms, enabling efficient service delivery to agencies nationwide. As noted in the RFP Q&A responses, on-site presence may be required for certain engagements depending on PPA needs and policies. Word Wizards is prepared to accommodate on-site requirements when specified in individual engagement scopes, with travel expenses billed accordingly.

Our secure FTP portal supports file exchange for consulting and remediation engagements. The portal provides:

- Dedicated folder structures for each agency engagement
- SSL/TLS encryption for secure document transfer
- Access controls with unique credentials for authorized users
- Easy configuration and onboarding

Status reports and dashboards can be created upon client request to track project progress, deliverable status, and engagement metrics.

SSO

Our FTP system can handle SSO integrations if supported and provisioned by the agency.

Minimum Engagement Thresholds

Word Wizards maintains flexibility to accommodate agencies of all sizes, with no barriers to entry for small entities:

No Minimum Volume Requirements: We do not require minimum annual commitments, subscription fees, or minimum order sizes. Small agencies pay only for services actually rendered, making accessibility consulting achievable within constrained budgets.

Recommended Minimum Project Size: For standalone consulting engagements, we recommend a minimum of 4 hours to ensure meaningful value delivery. However, we can accommodate smaller requests on a case-by-case basis.

Accommodations for Small Entities: Small agencies with limited budgets can access our pilot engagement packages, phased start-up options, and complimentary 30-minute consultations to evaluate their needs before committing to larger engagements. Our pricing structure ensures that even the smallest municipalities and special districts can access professional accessibility consulting services.

Section 2.3: Monitoring, Changes & Issue Handling

Word Wizards provides dynamic project monitoring, flexible change management, and responsive issue handling throughout the contract term. Our approach ensures agencies maintain visibility into work status while retaining the flexibility to adapt priorities, adjust scope, and evolve their accessibility programs as needs change.

Project Tracking and Monitoring

Every engagement receives systematic tracking from initial intake through final delivery. Our monitoring approach differs by service track while maintaining consistent visibility and accountability.

Once projects are received, each job receives a unique identifier and is tracked through our internal project management system.

Projects progress through defined stages with agency notification at each transition:

| Stage | Description |
|-------------------|---|
| Received | Documents logged in tracking system; acknowledgment sent within 4 business hours with preliminary assessment |
| In Production | Active remediation by assigned specialist; agency notified of production start and confirmed delivery timeline |
| Quality Assurance | Dual-layer QA including automated compliance checks, manual review, and screen reader validation with JAWS and NVDA |
| Delivered | Completed files transferred via secure channel with compliance certificate and summary report |

Our Project Managers maintain real-time visibility into all active work and can provide status updates on demand. For large-volume engagements, we establish scheduled reporting cadences (weekly or bi-weekly) to ensure agency stakeholders remain informed without requiring individual inquiries.

Status Updates and Dashboards

Word Wizards provides status information tailored to different audiences, ensuring that both technical staff and agency leadership receive the information they need in appropriate formats.

On-Demand Status Access

Agencies can obtain current status on any engagement at any time through multiple channels:

- **Direct Project Manager contact:** A phone call or email to your assigned Project Manager yields immediate status on manual remediation engagements. Our Project Managers have real-time access to all tracking data and can provide detailed updates upon request.
- **Scheduled status calls:** For large or complex engagements, we establish recurring check-in calls (weekly, bi-weekly, or monthly) to review progress, discuss upcoming work, and address any questions.

Change Requests and Scope Adjustments

Word Wizards accommodates evolving agency needs without bureaucratic barriers. We understand that accessibility programs must adapt to changing priorities, budget cycles, compliance deadlines, and organizational circumstances. Our change management approach emphasizes flexibility and responsiveness while maintaining appropriate documentation for significant contractual changes.

Routine Adjustments

Most changes are handled through simple communication with your Project Manager, without formal change order processes:

| Change Type | Our Response |
|-----------------------|--|
| Volume Adjustments | Negotiated based on the existing terms, the anticipated volume of content, and the results after testing the automation product to ensure content is compatible with high performance results. |
| Timeline Changes | Rush processing available with published premiums (+25% to +150% based on urgency). Schedule delays accommodated without penalty. |
| Priority Reordering | Document priorities adjusted upon request. Agencies can reprioritize queued work based on emerging needs. |
| Contact Changes | Updated promptly in our systems. New agency staff oriented to workflows and provided appropriate access. |
| Specification Updates | Revised requirements incorporated into workflow. Agency-specific checklists or style guides integrated as provided. |

Expansion to New Sites, Applications, or Document Types

When agencies need to expand scope to include new websites, applications, document repositories, or content types, we onboard the new scope under the existing contract:

- New sites and applications are assessed and integrated into the remediation program using standard intake processes
- Standard workflow and pricing apply; no separate procurement or contract modification required

- If new content requires specialized expertise (e.g., highly technical STEM content, multilingual documents), we identify appropriate resources and confirm any pricing implications before proceeding
- New document types (e.g., adding video captioning to a document remediation engagement) are added at published rates

Significant Scope Changes

For significant contractual changes that affect overall engagement structure, pricing, or terms, we provide formal documentation:

- Enterprise platform licensing arrangements for high-volume agencies
- On-premises deployment
- Multi-year commitment agreements with associated discounts
- Custom integration development beyond standard API capabilities
- Dedicated staffing arrangements for very large engagements

These changes are assessed within 24-48 hours, with written proposals provided for agency approval before implementation. Our goal is responsive partnership; agencies should never feel that process stands in the way of getting the accessibility support they need.

Section 2.4: Payment & Invoicing

Word Wizards provides flexible, transparent payment and invoicing practices designed to accommodate the diverse procurement requirements of Participating Public Agencies (PPAs). Our invoicing approach ensures clear documentation of services rendered, supports agency financial reporting requirements, and offers multiple payment options to align with agency purchasing policies and procedures.

Standard Invoicing Practices

Invoice Timing

Word Wizards submits invoices based on the nature and scope of each engagement:

- **Project completion:** For standard document remediation engagements, invoices are submitted upon project completion when all deliverables have been transferred to the agency. This approach ensures agencies pay only for completed, quality-assured work.
- **Batch billing:** For large-scale engagements involving substantial document volumes or extended timelines, we establish billing upon delivery of completed batches of documents.
- **Monthly billing:** For ongoing retainer arrangements, training programs with multiple sessions, or continuous remediation support, we submit invoices monthly for services rendered during the preceding period.
- **Platform usage:** For AE integrations and future platform use, we build these directly into the portal for easy tracking and dashboard level budget reports.

Invoice Content and Detail

All Word Wizards invoices include detailed documentation to support agency financial processing and audit requirements. Invoices are delivered electronically via email or designated submission portal specified by the agency. We accommodate agency-specific invoice formats, electronic invoicing systems, and submission portals as required.

Invoice Accuracy and Dispute Resolution

Word Wizards is committed to accurate, transparent invoicing. If an agency identifies a discrepancy or has questions about any invoice:

- Contact your Project Manager or our accounting department immediately
- We investigate and respond within two business days
- Legitimate errors are corrected and revised invoices issued promptly
- Disputed amounts do not affect payment terms for undisputed portions

Payment Terms

Standard Payment Terms

For first-time clients, we require payment in full or a signed purchase order prior to delivery of the final product. After establishing ongoing purchase orders, BPAs, or other funding confirmation, Word Wizards applies standard payment terms of Net 30 from invoice date. This allows agencies adequate time for internal processing while maintaining reasonable cash flow for our operations. We recognize that public agencies operate under various fiscal constraints and procurement policies, and we accommodate agency-specific payment terms as specified in purchasing policies or negotiated agreements.

Early Payment Discounts

Word Wizards does not offer early payment discounts to agencies

Extended Payment Terms

We understand that some agencies require extended payment terms due to fiscal policies, budget cycles, or cash flow timing. Word Wizards accommodates extended upon project requirement with official documentation of funding, subject to mutual agreement.

Accepted Payment Methods

Word Wizards accepts multiple payment methods to accommodate the diverse procurement practices of public agencies.

Purchase Orders

We readily accept purchase orders from all Participating Public Agencies

Procurement Cards (P-Cards)

We accept procurement card payments for agencies utilizing P-Card programs:

Credit and Debit Cards

Standard credit and debit card payments are accepted through the same channels as procurement cards:

ACH / Electronic Funds Transfer (EFT)

Word Wizards accepts ACH and EFT payments for agencies preferring electronic bank transfers:

Deposits

For purchase orders over \$2500.00, Word Wizards may require a deposit before beginning work depending on the services and turnaround time required.

Late Payment

Word Wizards will apply a 2% late payment fee for invoices over 120 days overdue. We will issue a final notice of late payment prior to any late payment fees and attempt periodic resolution during the period of non-payment. We understand sometimes the realities of government budgeting requires payment extensions, which can be provided if agreed to in writing by both parties.

Cooperative Contract Administration

Invoices for services rendered under the AFI cooperative contract clearly reference the contract number and Edge Public program participation. This documentation supports agency compliance verification and cooperative program reporting requirements.

The 5% administrative fee payable to Edge Public is incorporated into Word Wizards' published pricing structure. Agencies pay the quoted rates with no separate administrative fee line item. Word Wizards remits the administrative fee to Edge Public in accordance with the Supplier Administration Agreement, accompanied by required sales reporting.

Section 2.5: Service Delivery, Timelines & SLAs

Word Wizards delivers consulting, guidance, document remediation, multimedia accessibility, and related services to Participating Public Agencies (PPAs) nationwide. Our service delivery model ensures consistent quality and responsiveness regardless of agency location, size, or technical maturity, while providing the flexibility to scale from single-document requests to enterprise-wide accessibility programs.

National Service Delivery

Total Coverage

Word Wizards serves agencies throughout the United States from our headquarters in Silver Spring, Maryland (Washington, D.C. metropolitan area). Our service model is location-independent: all document remediation, quality assurance, and project management activities are performed by our U.S.-based team regardless of the agency's geographic location. We currently serve federal agencies, state governments, counties, municipalities, school districts, and special districts across all 50 states.

Our secure file transfer infrastructure operates 24/7, enabling agencies in any time zone to submit documents at their convenience. Completed deliverables are available for download around the clock through our secure FTP portal or the Accessibility On-Demand (AoD) platform.

Time Zone Accommodation

Word Wizards accommodates agencies across all U.S. time zones through flexible scheduling and extended availability:

- **Standard business hours:** Project Managers are available during extended Eastern business hours (8:00 AM – 6:00 PM ET, Monday through Friday), providing coverage from 5:00 AM to 3:00 PM Pacific Time.
- **Scheduled calls:** For agencies in Pacific, Mountain, Alaska, or Hawaii time zones, we accommodate scheduled calls outside standard Eastern hours upon request. Project Managers arrange recurring check-in calls at times convenient for agency stakeholders.
- **Asynchronous communication:** Email and secure portal communications are monitored throughout the business day, with responses provided within established SLA timeframes regardless of the agency's time zone.
- **Emergency contact:** For critical issues outside business hours, agencies can reach our emergency contact line for situations requiring immediate attention.

Supporting Agencies with Varying Technical Maturity

Word Wizards tailors our service approach to match each agency's capabilities and resources. For agencies with limited IT staff, we provide full-service support that minimizes technical burden, simple submission methods, plain-language communication, and delivered files ready for immediate use without requiring agency technical involvement. Agencies with moderate technical capabilities benefit from collaborative workflows, detailed documentation, and WCAG-referenced reporting that builds internal knowledge. For agencies with advanced IT teams and established accessibility programs, we offer deeper technical engagement including detailed issue logs, consultation on source document improvements, API integration with the AoD platform, and custom reporting. Our goal is to meet agencies where they are while supporting their growth toward greater accessibility maturity over time.

Scalability

Word Wizards' dual-track service model provides inherent scalability. Manual expert remediation scales through our experienced team of specialists, while AE automation enables rapid processing of large document volumes. This combination allows us to serve agencies across the full spectrum of size and need.

Small municipalities, special districts, and nonprofit organizations receive the same quality and service commitment as our largest clients. We maintain no minimum order requirements, and small batches typically turn around within one to three business days. Discounted pricing is available for small agencies and qualifying nonprofits, discussed during onboarding.

Mid-size agencies benefit from economies of scale through volume-based pricing arrangements, priority scheduling, customized reporting, and regular check-in meetings. Our Project Managers work with agency staff to optimize the balance between manual remediation and AE services, maximizing compliance outcomes within available budgets.

Large programs, including state agencies, metropolitan governments, and multi-agency collaboratives, benefit from dedicated account teams, program-level governance support, phased rollout planning aligned with DOJ compliance deadlines, and volume-based pricing negotiated based on projected volumes and commitment terms. AE automation can process thousands of documents simultaneously, providing enterprise-level capacity for large-scale remediation efforts.

Service Level Agreements

Word Wizards commits to clear, measurable service levels that ensure predictable, reliable performance. Our SLAs differ by service type and track, reflecting the distinct delivery models and requirements for each service category.

Response Time SLAs

Word Wizards commits to prompt, predictable response times based on issue urgency:

| Priority Level | Description | Response Time |
|----------------|---|-------------------------|
| Critical | Urgent compliance deadlines, legal/audit requirements, executive priorities, production system failures | Within 2 business hours |
| High | Project delays, quality concerns, expedited requests, escalated issues | Within 4 business hours |
| Standard | Status inquiries, routine coordination, general questions, non-urgent requests | Within 1 business day |

Response time is measured from receipt of the inquiry during business hours (8:00 AM – 6:00 PM ET). Inquiries received outside business hours are timestamped at the start of the next business day.

Delivery SLAs by Service Type

Document Remediation – (Full-Service Expert Remediation)

Delivery timelines for document remediation are based on volume and complexity:

| Document Volume | Standard Delivery |
|-----------------|--------------------|
| 1-25 pages | 1-3 business days |
| 26-75 pages | 2-5 business days |
| 76-150 pages | 3-6 business days |
| 151-300 pages | 4-8 business days |
| 300+ pages | 5-10 business days |

These timelines assume standard complexity documents. Highly complex documents with extensive tables, technical graphics, or specialized content may require additional time, which is

communicated during project intake. Rush delivery is available at premium rates for agencies with urgent deadlines.

Document Remediation – Automation-Enhanced (AE) Processing

AE processing through the Accessibility On-Demand (AoD) platform provides high-volume batch processing capability:

| Batch Size | Processing Time |
|--------------------|--|
| Up to 10,000 pages | 3-5 business days |
| 10,000+ pages | Timeline varies based on volume and complexity |

Larger batches or batches with high document complexity may exceed the standard timeframe once processing variabilities are accounted for. The platform provides real-time status visibility so agencies can monitor progress throughout processing.

Forms Remediation

Forms remediation involves making existing PDF forms accessible, including proper field labeling, keyboard navigability, and assistive technology compatibility. Forms remediation is included under standard per-page pricing based on complexity tier:

| Form Complexity | Standard Delivery |
|--------------------------------------|---|
| Simple forms 1-20 pages | 3-5 days |
| Complex forms with conditional logic | 7-10+ days (Case-by-case basis depending on complexity) |

Forms Development

Forms development is distinct from forms remediation and involves creating interactive PDF forms from scratch with advanced programming features. Forms development includes JavaScript for validation, calculations, custom functionality, and database integration. This specialized work is billed at an hourly rate and delivery timelines depend on the technical requirements of the project, including the number of fields, complexity of calculations and validation scripts, conditional logic and branching paths, and integration requirements. Forms development projects are scoped individually, with timeline estimates provided during project intake based on specific technical requirements.

Video Captioning

Word Wizards provides video captioning services including verbatim transcription, speaker identification, and synchronization with video timing:

| Batch Size | Standard Delivery |
|-----------------------------|-------------------|
| 1-20 hours of video content | 5-7 business days |

Technical or specialized content (legal proceedings, medical content, multilingual materials) may require additional time for accuracy verification.

Audio Description

Audio description timing is based on video complexity and the density of visual information requiring description:

| Batch Size | Standard Delivery |
|-----------------------------|--|
| 1-20 hours of video content | 7-21 business days (based on complexity) |

Videos with frequent visual-only information, complex graphics, or rapid scene changes require more extensive description scripting and production time. Audio description services include script development, professional voice recording, and integration with source video files.

Resolution and Mitigation Targets

When accessibility defects are identified in delivered work, Word Wizards acts swiftly to correct them:

Manual Remediation Compliance Guarantee: Documents remediated through our expert manual process are guaranteed to meet WCAG 2.1 AA, PDF/UA, and Section 508 standards.

AE Remediation Compliance Commitment: Documents processed through AoD are targeted to achieve 95%+ compliance. Documents falling below this threshold may be re-processed through automation or escalated to manual remediation at the applicable hourly rate.

Platform Availability and Uptime

Secure File Transfer System

Word Wizards' secure FTP/SFTP file transfer system supports manual remediation service delivery with the following availability commitments:

- **Uptime target:** 99.5% availability measured monthly, excluding scheduled maintenance windows.
- **Scheduled maintenance:** Performed during off-peak hours, typically weekends or after 10:00 PM Eastern. Agencies receive advance notice (minimum 48 hours) for planned maintenance that may affect availability.
- **Outage notification:** In the event of an extended unplanned outage, affected agencies receive email notification within four hours, with status updates continuing until resolution.

Accessibility On-Demand Platform

The AoD platform provides automation-enhanced document processing with the following availability framework:

- **Uptime target:** 99% availability measured monthly for the web-based platform interface, excluding scheduled maintenance.
- **Scheduled maintenance:** Platform maintenance is typically performed during weekend hours with advance notice to active users.
- **Incident communication:** Platform status and any service interruptions are communicated via email to registered users.

Third-Party Platform Notice: The Accessibility On-Demand platform is developed and hosted by archSCAN, LLC. AoD services are subject to potential interruption and technical issues outside of Word Wizards' direct control. In the event of platform disruptions, Word Wizards will promptly notify affected agencies and work directly with the developer to mitigate problems and achieve effective, prompt resolution.

Section 2.6: Problem Escalation, Warranty & Support

Problem Escalation Process

Word Wizards maintains a simple escalation process to uphold our commitment to responsive, relationship-based service. Problems are resolved quickly because decision-makers are accessible and empowered to act.

Escalation Path. The first point of contact for any issue is the agency's assigned Project Manager, who has authority to resolve most day-to-day matters including timeline adjustments, priority changes, and routine quality concerns. If the Project Manager cannot resolve an issue to the agency's satisfaction, or if the matter involves contractual, pricing, or policy questions, it escalates to the Account Executive, who oversees the overall client relationship and has broader decision-making authority. For urgent or unresolved matters requiring executive attention, agencies have direct access to our CEO, Ilana Gordon, who personally ensures resolution. This three-tier structure means that no issue requires more than two escalations to reach the highest level of our organization.

Communication Expectations. When an issue is raised, the receiving team member acknowledges it within four business hours and provides an initial assessment of the situation, expected resolution approach, and timeline. Agencies receive status updates at least daily for critical issues and at agreed intervals for less urgent matters until resolution is achieved. All escalations are documented, and agencies receive written confirmation when issues are closed, including a summary of actions taken and any preventive measures implemented.

Coordination with Agency Staff. We recognize that effective issue resolution often requires collaboration. Our team coordinates directly with agency technical staff, content owners, or procurement personnel as needed to diagnose problems, gather necessary information, and implement solutions. We adapt to agency communication preferences, whether that means phone calls, emails, video conferences, or participation in agency team meetings. Our goal is to function as an extension of the agency's team, not as a distant vendor.

Incident Communication

Word Wizards maintains clear communication protocols for service incidents affecting either track:

- **Initial notification:** Within one hour of confirmed incident affecting service availability or delivery timelines.
- **Status updates:** Every two hours during active incidents, or more frequently for critical situations.
- **Resolution notification:** Within one hour of incident resolution, including summary of impact and any required follow-up actions.

- **Post-incident review:** For significant incidents, we provide a written summary within five business days describing root cause, impact, and preventive measures implemented.

Incident communications are delivered via email to designated agency contacts. For agencies with active critical projects, we provide direct phone notification in addition to email.

Warranties and Rework

Remediation Services Warranty Summary

Manual Remediation: Word Wizards guarantees 100% compliance with WCAG 2.1 AA / 2.2 AA, Section 508, and PDF/UA standards. In the event a remediated document is found to be non-compliant, we will work with the agency to review the specific findings. If the issue is attributable to our work, we will correct it promptly at no additional cost. Deficiencies arising from factors outside our remediation, such as source file limitations or post-delivery modifications, will be corrected at standard hourly rates.

Automated Remediation: Automated processing typically achieves 95% or higher compliance. Full third-party compliance reports are provided for all documents. Documents falling below the 95% threshold may be escalated to Manual Processing at applicable hourly rates. Automated remediation services are provided subject to the Automation Services Warranty Disclaimer.

Automation Services Warranty Disclaimer: Automation assisted remediation services are provided using third-party automation and AI-LLM technology. Results may vary based on document complexity and source quality. Word Wizards makes no guarantee of 100% compliance with WCAG 2.1 AA, PDF/UA, Section 508, or any other accessibility standard under AE workflows.

Compliance scores for AoD deliverables are generated by a third-party accessibility checker and are provided “as is” without independent verification, interpretation, or warranty of accuracy. Word Wizards assumes no responsibility for limitations or errors in third-party compliance reporting.

Full compliance assurance requires elevation to manual services with expert human review. By selecting AoD powered services, the client acknowledges these limitations and assumes all risk associated with residual compliance deficiencies. The client further acknowledges that for large-scale remediation projects encompassing hundreds of thousands or millions of pages, an acceptable threshold of compliance deficiencies is inherent to automated processing and represents a reasonable trade-off for the speed, scale, and cost-effectiveness that AoD services provide.

Important Notice Regarding Automation Platform

Agencies considering automation-enhanced services should understand the following considerations regarding the Accessibility On-Demand (AoD) platform:

Emerging Technology: Automated PDF remediation represents an emerging capability in the accessibility field. While the Accessibility on Demand (AoD) platform has demonstrated strong performance on substantial test content, achieving 95-98% compliance rates through automation alone, broad commercial deployment remains relatively new. As with any emerging technology, initial performance may exhibit variability as the platform encounters the diverse range of document types and formatting characteristic of public sector environments.

Continuous Improvement: Platform stability, accuracy, and feature capabilities will improve over time through ongoing partnership between Word Wizards, archSCAN (the platform developer), and our agency clients. Feedback from production usage directly informs platform enhancements, and we are committed to transparently communicating improvements as they are deployed.

Development Realities: Future platform developments, feature additions, and integration capabilities are subject to the practical realities of software development, including programming complexity and budgetary limitations. While we have outlined an evolution pathway from managed services through API integration and enterprise deployment, specific timelines and feature availability may be adjusted based on development progress and market requirements.

Human Validation Safeguard: To mitigate risks associated with automation variability, all AE services include human validation of a random sample by trained remediation specialists. This hybrid approach ensures that automation outputs are verified before delivery, maintaining quality standards even as the underlying technology matures.

Manual Remediation Availability: Agencies requiring guaranteed 100% compliance, predictable delivery based on proven processes, or risk-averse approaches should utilize full-service expert manual remediation. Manual services rely entirely on human expertise with over 25+ years of demonstrated performance and carry no technology maturity considerations.

Word Wizards is committed to transparency regarding both the opportunities and limitations of automation-enhanced accessibility services. We view our AE offering as a valuable option for appropriate use cases, particularly high-volume archival content where cost efficiency is paramount, while maintaining manual remediation as the gold standard for priority content requiring absolute compliance assurance.

Support Resources and Documentation

Word Wizards provides support materials and educational content tailored to agency needs upon request. Resources may include direct one-on-one training sessions, written documentation, and modular knowledge articles addressing specific accessibility topics, tools, or workflows. Platform training and instruction on use of our systems is included as part of the standard onboarding phase for all new engagements. Additional support materials can be developed to meet agency-specific requirements as needed throughout the contract term.

Section 2.7: Cooperative Administration & Reporting

Marketing and Promotion

Collaborative Partnership with AFI and Edge Public

Word Wizards is committed to actively marketing and promoting the AFI contract as a pilot program demonstrating a new paradigm in document accessibility services. We view this cooperative contract not merely as a sales channel, but as an opportunity to showcase how the combination of proven human expertise and emerging automation technology can transform how public agencies approach accessibility compliance at scale.

We will work closely with AFI and Edge Public to develop and execute joint marketing initiatives that reach eligible entities nationwide. Our collaborative approach will include:

- **Joint content development:** Word Wizards will collaborate with AFI and Edge Public marketing teams to create educational content, case studies, webinars, and promotional

materials that highlight the contract's unique value proposition. We will provide subject matter expertise on accessibility trends, DOJ compliance requirements, and the evolving technology landscape to ensure marketing content is accurate, timely, and compelling.

- **Conference and event participation:** When possible, Word Wizards will participate in AFI events, Edge Public partner meetings, and relevant public sector conferences to promote the contract and educate potential users. This includes providing speakers for webinars, contributing to panel discussions, and staffing exhibit opportunities as appropriate.
- **Direct outreach support:** Our team will support Edge Public sales efforts by participating in agency outreach calls, providing technical expertise during sales presentations, and responding promptly to agency inquiries generated through cooperative marketing channels.
- **Success story documentation:** As agencies achieve compliance milestones through this contract, we will work with AFI and Edge Public to document and share success stories that demonstrate the program's value to prospective participants.

Positioning as a Pilot Program

Word Wizards will market and promote this contract as a pilot program that introduces a new model for accessibility services, one that combines the reliability of expert human remediation with the scalability of automation-enhanced processing. This positioning reflects the genuine innovation represented by our dual-track approach and creates a compelling narrative for agencies evaluating their compliance options.

The pilot program framing emphasizes several key themes:

- **Innovation with accountability:** Agencies participating in this contract gain access to emerging automation technology while retaining the security of proven human expertise. The dual-track model allows agencies to adopt automation at their own pace, with full-service manual remediation always available as a guaranteed-compliance option.
- **Partnership in technology maturation:** Early adopters of AE automation services become partners in refining and improving the technology. Their feedback directly informs platform enhancements, and they benefit from improvements as the technology matures. This collaborative approach creates shared investment in the program's success.
- **Transparent expectations:** By positioning this as a pilot program, we set appropriate expectations about the emerging nature of automation technology while highlighting the safeguards, human validation, compliance guarantees, and manual remediation availability, that protect agencies regardless of which track they choose.

Differentiation from Other Contracts

Word Wizards holds other cooperative and state contracts for accessibility services. We will differentiate the AFI/Edge Public contract through the following approaches:

- **Dedicated program identity:** We will maintain a distinct program identity for the AFI contract, including contract-specific quotes, dedicated reporting, and clear identification on all invoices and communications. Agencies and our internal team will clearly understand when work is being performed under this cooperative vehicle.

- **Pricing structure alignment:** The AFI contract pricing structure, including the 5% administrative fee and cooperative-specific volume arrangements, is distinct from pricing under other contracts. This ensures that the AFI contract stands on its own merits and that participating agencies receive the full benefit of the cooperative's aggregated buying power.
- **Proactive promotion:** When engaging with agencies that could use either the AFI contract or another vehicle, we will proactively present the AFI option and explain its unique benefits, particularly for agencies interested in the hybrid automation model or seeking the specific advantages of the AFI/Edge Public cooperative network.

Contract Pricing and Terms Verification

Word Wizards ensures that participating agencies can easily verify they are receiving correct contract pricing and terms through multiple mechanisms:

Contract Identification

- **Contract reference on all documents:** Every quote, proposal, and invoice issued under this contract will prominently display the AFI contract number (AFI-2025-117) and identify Edge Public as the cooperative administrator. This clear identification ensures agencies and their procurement staff can immediately verify the applicable contract vehicle.
- **Contract-specific quotes:** When preparing quotes for agencies, we generate contract-specific documents that reference the AFI contract pricing matrix and applicable terms. Quotes clearly itemize services, applicable rates, and any volume-based or other adjustments, allowing agencies to verify alignment with published contract pricing.
- **Statement of work alignment:** For larger engagements, statements of work explicitly reference the AFI contract and incorporate its terms by reference, ensuring contractual clarity and audit trail documentation.

Pricing Verification

- **Published rate schedules:** Contract pricing is documented in the awarded contract materials available through AFI and Edge Public. Agencies can compare quoted rates against published schedules to verify accuracy.
- **Itemized invoicing:** All invoices provide detailed itemization showing quantities, unit rates, service categories, and applicable discounts. This transparency enables agencies to verify that billed amounts align with contract terms and quoted prices.
- **Inquiry response:** Agency procurement or finance staff may contact our Project Manager or accounts team at any time to verify pricing, request rate confirmation, or clarify invoice details. We respond to such inquiries within one business day.

Terms Verification

Agencies can verify they are operating under correct contract terms through the contract reference displayed on all transactional documents. The AFI contract number serves as the definitive indicator that AFI/Edge Public cooperative terms, including warranty provisions, compliance guarantees, SLAs, and administrative requirements, apply to the engagement. Agencies uncertain about applicable terms may request a copy of the relevant contract excerpts or contact our team for clarification.

Quarterly Sales and Usage Reporting

Word Wizards will provide comprehensive quarterly sales and usage reports to AFI and Edge Public, enabling effective program administration and demonstrating contract value to stakeholders.

Report Content and Structure

Each quarterly report will include:

- **Total gross dollar volume:** Aggregate sales revenue generated under the AFI contract during the reporting period, with comparison to prior periods to show trends and growth.
- **Participating agency breakdown:** Itemized listing of all agencies that utilized the contract during the period, including individual agency spend totals. This enables AFI and Edge Public to understand program adoption and identify high-utilization participants.
- **State and regional breakdown:** Sales volume organized by state and region, allowing AFI and Edge Public to identify geographic patterns, target underserved areas for outreach, and demonstrate program reach to stakeholders.
- **Service category breakdown:** Revenue allocation across major service categories, including manual document remediation, AE automation-enhanced processing, forms development, video captioning, audio description, and consultation services. This breakdown reveals service mix trends and helps inform program development priorities.

Report Format and Delivery

Quarterly reports will be delivered electronically in formats suitable for Edge Public's administrative requirements. We will provide reports in spreadsheet format (Excel) for data analysis purposes, along with a summary narrative highlighting key trends, notable engagements, and program observations. Reports will be delivered within 15 days following the close of each calendar quarter, or on an alternative schedule if preferred by Edge Public.

Additional Reporting Capabilities

Beyond standard quarterly reports, Word Wizards can provide:

- **Ad hoc reports:** Custom reports addressing specific questions or requirements from AFI or Edge Public, such as analysis of particular service categories, agency types, or time periods.
- **Annual summaries:** Comprehensive annual reports consolidating quarterly data and providing year-over-year analysis for program review and planning purposes.
- **Program metrics:** Beyond financial reporting, we can provide operational metrics such as document volumes processed, average turnaround times achieved, compliance rates, and customer satisfaction indicators to support program evaluation.