

# Invitation for Bid AEPA #023-D SCHOOL & INSTRUCTIONAL SUPPLIES

## Part B – Technical Specifications

### Table of Contents

1.	<a href="#">Scope of Bid</a> .....	1
2.	<a href="#">Type of Bid</a> .....	1
3.	<a href="#">Anticipated AEPA Member Agency Participation</a> .....	2
4.	<a href="#">Anticipated Volume</a> .....	3
5.	<a href="#">Voluntary Pre-Bid Conference Call</a> .....	3
6.	<a href="#">General Specifications</a> .....	3
7.	<a href="#">Product   Category Specific Specifications</a> .....	4
8.	<a href="#">Shipping</a> .....	4
9.	<a href="#">Pricing</a> – See Pricing section in Part A – General Terms & Conditions for details.....	4
10.	<a href="#">Evaluation</a> .....	6

#### 1. Scope of Bid

AEPA is seeking qualified, experienced contractor(s) who possess the necessary resources and capabilities to acquire, deliver and perform the required supplies, materials equipment and labor to all participating member states (up to 29) in the category of School & Instructional Supplies.

- a. Respond to request from a number of different types of educational, governmental and public institutions seeking School & Instructional Supplies.
- b. These parts and supplies will include but are not limited to: School & Instructional Supplies, including classroom and meeting room supplies, printing, art supplies, specialty (non-standard) classroom equipment and furniture, discipline-specific teaching aids and supplies for age specific instruction from early childhood to adult.
- c. Types of services may include but are not limited to installation and support services normal to a School & Instructional Supplies catalog.

All products offered must be considered new, unused, of the latest design and technology and from the most current and popular product lines available.

AEPA and Member Agencies prefer a single vendor with a comprehensive array of products. However, because of the unique nature of School & Instructional Supplies products, Member Agencies may consider multiple awards, if the lowest, best-value bids come from Bidders whose business concentrates on subset of School & Instructional Supplies, such as 1) STEM/STEAM, 2) Art, 3) or Special/Alternative Education.

#### 2. Type of Bid

AEPA requests Bidders to submit primary pricing in the form of either “catalog pricing,” or “line-item pricing.” This category is constructed in the form checked below. An explanation of each can be found in the table below. Additional information on permissible pricing strategies can be found in Part A – General Terms and Conditions under “Pricing.”

**This bid is considered a:**

YES	NO	TYPE OF BID
X		<b>CATALOG:</b> A catalog bid is utilized when the products and/or services solicited are clearly identified with set and specific characteristics, attributes and configurations that are identifiable as a stand-alone single unit and can be listed and priced as a single unit with options that can be added to enhance and/or improve its operation and functionality. The Bidder offers a fixed discount(s) off retail price or prices in a Commercially Available Catalog. The discounts may be for the entire Commercially Available Catalog, for specific products, product lines, manufacturers or category of products as determined by the Bidder. See Pricing section for detailed information on Catalog Pricing.
	X	<b>LINE ITEM:</b> A line-item bid is utilized when the products and services solicited cannot be identified or listed as a single unit; consists of a number of different variables and configurations, it is necessary to identify the specific project or application; the end product or solution is made of individually priced elements or components and the end product's or solution's cost is derived by the Vendor Partner specially prepared and providing a quote based on the project's terms, conditions and requirements. See Pricing section for detailed information on Line-Item Pricing.

**3. Anticipated AEPA Member Agency Participation**

State	Participate?	Other States Member Sells In
California	Yes	AZ, NV
Colorado	Yes	
Connecticut	Yes	ME, NH, NY, RI, VT
Florida	Yes	AL
Georgia	Yes	
Illinois	Yes	
Indiana	Yes	
Iowa	Yes	SD
Kansas	Yes	OK
Kentucky	Yes	AL, LA, MS, NC, TN
Massachusetts	Yes	
Michigan	Yes	
Minnesota	Yes	SD
Missouri	Yes	AR, LA, SD
Montana	Yes	ID
Nebraska	Yes	
New Jersey	No	
New Mexico	Yes	
North Dakota	Yes	
Ohio	Yes	
Oregon	Yes	
Pennsylvania	Yes	DE, HA, MD, NY
South Carolina	Yes	NC
Texas	Yes	
Virginia	Undecided	
Washington	Yes	AK, ID
West Virginia	Yes	
Wisconsin	Yes	
Wyoming	Yes	SD, UT

Please note that individual AEPA Member Agencies that have indicated that they intend to participate in any contract approved under this solicitation, does not guarantee or mean that the individual AEPA Member Agency will enter into a contract with any AEPA approved Vendor Partner. Each AEPA Member Agency will make that determination after reviewing Vendor Partner responses and AEPA's recommendation for acceptance and bid award. The AEPA Member Agency's contracting decision shall be final.

**4. Anticipated Volume**

School & Instructional Supplies is a currently held category for AEPA. The resulting bid will be an Indefinite Delivery, Indefinite Quantity (IDIQ) contract(s). AEPA Member Agencies reported approximately \$29.5 million in sales in the School & Instructional Supplies category in 2021 for this category. AEPA Member Agencies anticipate that purchase volumes will increase over the course of contract years two (2) through four (4). This information is provided as an aid to Bidders in preparing responses only. It is not to be considered a guarantee of volume. The successful Vendor Partner’s discount and pricing schedule shall apply regardless of the volume of business under the contract.

**5. Voluntary Pre-Bid Conference Call – August 17, 2022**

AEPA will host a voluntary pre-bid conference call for any interested Bidders or potential Bidders. The conference call times are set in the following schedule for each of the four contiguous United States time zones. No pre-registration will be required. Recording of the conference call will be posted on the AEPA Website.

Voluntary Pre-Solicitation Conference Call Schedule (All Categories)

Solicitations	Eastern	Central	Mountain	Pacific
023-A Maintenance Repair & Operations	11:00 AM	10:00 AM	9:00 AM	8:00 AM
023-B Custodial Supplies and Equipment	11:30 AM	10:30 AM	9:30 AM	8:30 AM
023-C Office Catalog	12:00 PM	11:00 AM	10:00 AM	9:00 AM
023-D School and Instructional Supplies	12:30 PM	11:30 AM	10:30 AM	9:30 AM
023-E Technology Buyback	1:00 PM	12:00 PM	11:00 AM	10:00 AM
023-F Audio Visual Integration	1:30 PM	12:30 PM	11:30 AM	10:30 AM
023-G Athletic Equipment & Supplies	2:00 PM	1:00 PM	12:00 PM	11:00 AM

**Conference Call Number/Online Connection:**

<https://us02web.zoom.us/j/87228214926?pwd=djFVa0lDVC8zdFArK0prZUx3SlJlZz09>

**Meeting ID:** 872 2821 4926

**Passcode:** 2MmddyN

**Dial In Information:** +1 312 626 6799 US

**Meeting ID:** 872 2821 4926

**Passcode:** 536510

**6. General Specifications**

Item	Description
6.1.1.	The Vendor Partner will have access to a full inventory of the awarded product line.
6.1.2.	The Vendor Partner will maintain a minimum monthly overall average fill rate of 95% or above for non-custom items. Exceptions will be approved with notification of supply disruptions. Items that are reordered, backordered, or partially filled are not considered filled items when calculating this service level.
6.1.3.	Orders must be shipped within 48 hours after receipt of an order 90% of the time. The Vendor Partner will notify the Buyer if product ordered cannot be shipped within this time period to provide the opportunity to secure product elsewhere.
6.1.4.	Vendor Partners must be a manufacturer’s authorized sales and service dealer for all proposed equipment/software. An authorized sales and service dealer is defined in this solicitation as one purchasing their products for resell directly from the manufacturer(s) or the manufacturer’s approved channels. Products that result from new authorized sales and service dealer arrangements between the Vendor Partner and the manufacturer during the term of this contract may be added and offered through the AEPA contract.
6.1.5.	All charges and components necessary for performance of the contract shall be clearly identified even if such are not specifically addressed in any paragraph or sub-paragraph or form that is a part of this

Item	Description
	request.
6.1.6.	If the Vendor Partner intends to utilize independent agents/distributors, subcontractors and/or third-party agents to perform and/or provide any part of the products and services offered herein, the Vendor Partner must identify all providers and any and all associated costs with these providers.
6.1.7.	Optional services must be identified separately and must include clear descriptions of proposed services.
6.1.8.	Vendor Partners must provide a product or mix of products in a manner that will allow Buyers to migrate to emerging technologies/services and between legacy technologies with no penalty charge associated with maintaining the most appropriate selections of goods and services throughout the life of the contract.
6.1.9.	Vendor partners will be required to provide their complete product offerings in an electronic catalog upon request.
6.1.10.	Packing slips shall accompany all deliveries and shall contain Buyer's purchase order number, vendor name and name of article. Cartons shall be identified by purchase order number and vendor name.
6.1.11.	Orders not filled and partials shall be indicated on the packing list. Vendor Partner shall inform member of anticipated availability date for unfilled and partial orders.
6.1.12.	All products sold by the Vendor Partner must be new. Only the newest versions of software and equipment will be bid. Older versions will only be sold, if specifically requested. Vendor Partner may offer reconditioned products as a Voluntary Alternate; such items shall be marketed and labeled as being reconditioned.
6.1.13.	Products that have a money back guarantee will be clearly identified in the catalog and on the web site (if applicable).
6.1.14.	Vendor Partner has the option to offer private label products. Vendor Partner shall maintain the same manufacturer specifications for private label products throughout the term of contract. Any change of manufacturers for a private label shall result in offerings equal to or superior to the originally approved manufacturer at a price equal to or lower than the original offering.
6.1.15.	If the Vendor Partner makes an error in pricing (typographical or photographic error, for example), the Buyer reserves the right to return the product. The Vendor Partner agrees to pay for cost of any returned product due to a pricing error.
6.1.16.	Vendor Partner shall provide a Safety Data Sheet (SDS) for all items sold, if required. A separate sheet shall be provided for each individual item when purchase is made.

## 7. Product | Category Specific Specifications

Item	Description
7.1.1.	The catalog includes a variety of manufacturers of specified products and services, and 80% or more of the catalog is dedicated to School & Instructional Supplies.
7.1.2.	The Vendor Partner provides general School & Instructional Supplies that include but are not limited to items listed in Part F, tab F2A Core List Price Schedule. Also see reference to subcategories in the Scope of Bid section, above.

## 8. Shipping

Item	Description
8.1.1.	Orders that are \$100.00 or more shall include standard shipping in the total price. Vendor Partner shall bid a flat rate for all orders that are less than \$100.00 regardless of where to be shipped in the continental United States.

## 9. Pricing

AEPA has identified and stipulated the type of bid and the pricing methodologies that are to be utilized to price and submit bid prices. The Vendor Partner agrees that the cost for any item bid or offered on this contract will be uniform for all states, and that any differences in pricing are due to state specific installation and labor costs, AEPA Member Agency's Administrative Fee, or other approved reasons. The Bidder must provide their pricing as requested utilizing the various pricing methodologies specified. **The Bidder/Vendor Partner must agree that they will offer prices equal to or better than what they**

**ordinarily offer to individual entities or cooperatives with equal or lesser volume.** Please note the following that relate to pricing:

1. **Primary Pricing Strategies:** All Bidders will be required to submit “Primary Pricing” in the form of either “Catalog Pricing” or “Line-Item Pricing” or a combination of these two pricing strategies as defined in Part B, bid specifications. Bidders are also encouraged to offer OPTIONAL pricing strategies including “Hot List” and “Volume Discounts”.
  - a. **Catalog Pricing:** Catalog pricing is utilized when the products and/or services solicited are clearly identified with set and specific characteristics, attributes and configurations that are identifiable as a stand-alone single unit and can be listed and priced as a single unit with options that can be added to enhance and/or improve its operation and functionality. The Bidder offers a fixed discount(s) off retail price, catalog price, published price or list price. The discounts may be for the entire commercially available catalog, for specific products, product lines, manufacturers or category of products as determined by the Bidder.
    - i. **Discounts:** Discount offers must clearly identify percent of discount to apply to a commercially available catalog, manufacturer, MSRP, retail or nationally published price lists. Bidders shall identify and stipulate if the discounts apply to the entire catalog/price list, specific product lines, manufacturers and/or categories of products. Bidder shall agree that there will be no reduction in discount(s) during the term of the contract.
    - ii. **New Catalogs/Price Changes:** New catalogs and corresponding nationally published price lists may be submitted throughout the term of the contract and shall be submitted to the AEPA Category Committee for review prior to release to all AEPA Member Agencies. Prices may change based on manufacturer’s price changes, new published pricing or price lists, but the original discount bid shall remain firm for the duration of the contract.
    - iii. **Core List:** In a Catalog Priced bid, a category (i.e., office supplies) may include a “core list” which contains a selection of the most commonly used products/services with the expectation that a deeper discount would be bid for these items. If a new catalog and price list is published during the contract term, the original discounts shall be applied to the new published prices to establish the AEPA price for these core items.
    - iv. **Product Addition/Discontinuation:** New products, within the same scope of work, may be added at the established percentage discounts at any time. Discontinued products may be dropped at any time during the year. In the event a Core item is discontinued by the manufacturer during the term of the contract, Vendor Partner is required to add a functionally equivalent substitute at the same discount structure.
2. **Secondary Pricing Methods (Catalog Bids only, see Part B for category designation):** Bidders are encouraged to offer Customized Price Lists (Catalog Bids ONLY) and encouraged to offer Hot Lists and Volume Discounts as follows:
  - a. **Customized Price List:** Bidders are encouraged to offer customized price lists to Participating Entities for items within the Bidder’s Commercially Available Catalog for Catalog Bids ONLY (not pertinent to Line-Item Bids). Customized price lists shall be allowed under the following conditions:
    - i. Items within the Vendor Partner’s Commercially Available Catalog may be included on the customized price list providing they are not already on the Core Item list
    - ii. Items are to be determined by the Participating Entity; Vendor Partner may object to up to ten (10) of the suggested items proposed by the customer and must offer substitutes until an agreement of the customized list is reached.
    - iii. Items on the customized price list shall be sold with an additional discount (deeper than what was originally bid on the non-core or catalog discount)
    - iv. Items may not include special order or customized service products unless agreed to by the Vendor Partner.
  - b. **Short Term Pricing Reductions/Incentives and Regional Promotions:** Respondents are invited, at their option, to offer a selection of products/services at greater discounts than those listed in the standard catalog or core list discounts. Special time-limited reductions are

permissible under the following conditions:

- i. The price reduction is for a specific period, no less than thirty (30) days.
  - ii. The reduction/incentive may be used to discount and liquidate close-out and discounted products/services if those items are clearly labeled as such.
  - iii. The original price for products/services is not exceeded after the time limit.
  - iv. The AEPA Category Committee and any affected AEPA Member state must be notified of any special or time-limited price reduction.
  - v. New prices must be on record fifteen (15) days prior to any offer of the new priced being proposed or offered to AEPA Member Agencies and Participating Entities.
  - vi. Pricing for all items must be submitted to all affected AEPA Member Agencies in an electronic format so that specials can be posted to websites, emailed, and shared with Participating Entities/Buyers.
- c. **Volume Price Discounts:** Bidders are encouraged to offer additional pricing discounts that may be offered for a group of agencies in a local geographic area that desire to combine requirements (one time purchase, or annual spend), i.e., local city, county, school district(s), etc. and/or for large one-time purchases. Additional volume price discounts are permissible under the following conditions: Discounts should be tiered and based on spend ranges as established by the Bidder on the Pricing Forms. Volume determination shall be determined between the Vendor Partner and the individual Buyers on a case-by-case basis. All additional discounts are to be offered equally to all AEPA Member Agencies and Participating Entities and be based on the Volume Price Discounts originally bid providing the same or similar volume commitment, specific needs, terms and conditions, a similar time frame, seasonal considerations and provided the same manufacturer support is available to the Vendor Partner.

### 3. Part F - Pricing Workbook

- a. Pricing shall be completed on the provided pricing sheets (Microsoft Excel Workbook) with the individual tables to be completed as follows:
  - i. F.1 – Catalog Discounts (Required)
  - ii. F.2A – Core List Price Schedule. You may also upload separate spreadsheets **as long as they contain the minimum information as described on F.2A**. Additional products offerings may not be added to this form. (Required)
  - iii. F.2B – Non-Core Price Schedule. You may also upload separate spreadsheets **as long as they contain the minimum information as described on F.2B** (Required)
  - iv. F.3 – Services Price Schedule (Optional)
  - v. F.4 – Volume Discounts (Optional)
- b. The Catalog Category Discount and the Core Items award will not be split
- c. Bid pricing will be evaluated on a combination of items from both the Core List and Non-Core List Price Schedules.
- d. Pricing evaluation may include considerations, other than product cost, including the total cost of the acquisition and whether the Proposer's offering represents the best value. See Evaluation, Approval and Award in Part A – Terms and Conditions for additional information.

## 10. Evaluation

The AEPA Committee for this category will evaluate bid responses based on the entire response, and according to the criteria detailed in Part A for AEPA's definition of Responsive and Responsible bids.

As a part of the process of determining responsible respondents, the category committee may request reports that describe the financial soundness of your organization. You may be asked to include a third-party report or reports that demonstrate your firm's strength. Accepted financial reports may include balance sheets and Profit & Loss statements for the past three years, a Letter of Credit or Line of Credit from a bank or lending institution indicating the line of credit limit and the average outstanding balance, Dun & Bradstreet reports, a complete Annual Financial Report (for publicly traded companies).

A recommendation may be made to recommend a single response, or to recommend multiple bidders based on differentiation of product or service between bidders. AEPA will vote as a whole to accept or not accept a committee’s recommendation. Once accepted, each recommended bid response will go to the individual states for contract approval. Please note, pricing evaluation may include other considerations, including the total cost of the acquisition and whether the Proposer’s offering represents the best value. The evaluation committee may consider such factors as life-cycle costs, total cost of ownership, quality, and the suitability of an offering in meeting AEPA members’ needs.

Below is a summary taken from the Evaluation section in Part A, F. Bid Evaluation, Approval and Award:

<b>Evaluation Criteria</b>
Cost Evaluation
Complete Response to Bid
Conformance to Bid Terms and Conditions
Pricing Equal to or Better Than That Offered to Individual Entities or Cooperatives with Equal or Lesser Volume
Quality and Suitability of Products Offered
Marketing Plan
Financial Viability
Demonstrated Track Record of Performance in the Public Marketplace
Value Added Attributes