Invitation for Bid
AEPA #027-C
OFFICE, SCHOOL, INSTRUCTIONAL SUPPLIES AND EQUIPMENT

Part A – Instructions and Specifications

Notice to Respondents

The Association of Educational Purchasing Agencies (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 31) in the category of Office, School, Instructional Supplies, and Equipment.

Fulfill requests from diverse educational, governmental, and public institutions for a wide variety of office, school, and instructional supplies and equipment. These items are required to support the operations of general-purpose municipal offices, training facilities, pre-K through 12 schools, higher education classrooms, and related functional spaces.

This category includes:

School & Instructional Supplies, including classroom and meeting room supplies, printing, art supplies, discipline-specific teaching aids and supplies for age specific instruction from early childhood to adult.

General office supplies, office electronics, office technology, paper products, miscellaneous equipment, specialty equipment and supplies, breakroom and custodial supplies, shipping/mailing room supplies.

Types of **services** may include but are not limited to copy, print services, imprinted promotional items, and installation and support services normal to a Office, School & Instructional Supplies and Equipment catalog.

AEPA and Member Agencies are seeking respondents for vendors with a comprehensive array of products (distribution catalog), and because of the broad nature of this category, AEPA seeks bidders whose business concentrates on a specialty area or subset of Office, School, Instructional Supplies and Equipment.

Examples of specialty categories include but are not limited to 1) Promotional Products, or 2) Shipping and Packing Supplies, 3) STEM/STEAM, 4) Art, 4) or Special/Alternative Education.

Solicitation offers will be received by the Association of Educational Purchasing Agencies (AEPA) on behalf of its Member Agencies until: **August 13, 2026, at 1:30 p.m. ET**

All offers must be submitted online through the Euna Procurement eProcurement website by the deadline listed above. AEPA solicitation documents are available for free download after registering at: https://aepacoop.org/registration-solicitations/

AEPA and/or its Member Agencies may reject any or all offers, waive informalities, and accept the offer that best serves the interests of participating entities under state law.

Respondents must be able to provide the proposed products and services in up to 31 states, though not all states participate in every solicitation. The full list of participating states is provided in Section 4.3 below.

Solicitations will be opened on **August 13, 2026, at 2:00 p.m. ET.** at EducationPlus, 1460 Craig Road, St. Louis, MO 63146.

Bid & Contract Timeline:

June 30, 2026	Release of IFBs/RFP via Euna Procurement
July 9, 2026	Informational Pre-Bid Conference Call
July 24, 2026	Deadline for questions from Respondents
August 13, 2026	Deadline for Submittals and Reading via Euna Procurement
August 15, 2026	Opening Record posted on the AEPA website, www.aepacoop.org
November 10-12, 2026	AEPA Approval of Offers
After November 12, 2026	Director of Solicitations submits contracts to AEPA Member Agencies to be forwarded to Vendor Partners for signature.
	Initial contract term–See Term of Contract and Extensions in General Terms & Conditions. Annual contract renewal dates are subject to approval by AEPA.

1. General Solicitation Procedures

1.1 Issuing Agency

Vendors benefit through AEPA solicitations because one response submitted to AEPA may be approved and then awarded by multiple AEPA Member Agencies for use by participating entities across 31 states, serving more than 36 million students, along with other eligible local government agencies and nonprofit organizations. Solicitations may be issued as either an IFB or an RFP, depending on the type of goods or services.

Each AEPA Member Agency will separately publish notice of the solicitation. Responses will be evaluated by category committees made up of participating Member Agency representatives. After AEPA approval, individual Member Agencies may award contracts to approved vendors. Contracts awarded through AEPA must comply with each state's procurement laws.

AEPA's role is limited to preparing and distributing solicitation documents, conducting an initial evaluation, and recommending vendors for approval. AEPA is a cooperative group of agency officials working together to meet public purchasing needs.

AEPA requires that Respondents only respond if they can offer prices equal to or better than what they ordinarily offer to individual entities or cooperatives with equal or lesser volume.

Cooperative purchasing laws are based on the idea that shared contracts save both time and money. Time is saved because political units can use pre-solicited, volume-discounted contracts without having to manage their own competitive procurement process. Money is saved through reduced administrative costs and lower prices achieved through group purchasing power.

Because cooperative contracts may be used by hundreds of political units, they must provide clear value. If pricing is the same as or higher than what a single agency or state contract could obtain independently, members may not find the cooperative contract appealing. **Therefore, AEPA asks Respondents to offer competitive pricing and packages that will encourage members to choose the cooperative contract.**

AEPA membership policy allows new agencies to join upon approval by current members. Once added, these agencies and their members may purchase through existing contracts, with approval from the awarded Vendor Partners and in compliance with applicable state laws.

1.2 Questions/Addenda

All Respondent questions must be submitted online through Euna Procurement by the deadline listed in the table above; AEPA will not accept questions in any other format. Each question must be entered separately. All questions and answers will be posted on Euna Procurement, and Respondents will receive email notifications when AEPA responds.

It is the Respondent's responsibility to review all posted questions and answers before the deadline. Late questions will not be answered.

If AEPA issues addenda, Respondents will also be notified by email. Respondents are responsible for acknowledging addenda and submitting responses that reflect any changes.

Questions about accessing the solicitation in Euna Procurement may be directed to the Director of Solicitations at bid-committee@aepacoop.org

1.3 Respondent Qualifications

A key part of the solicitation process is evaluating whether a company is qualified. Respondents must provide all required answers, responses, and documentation in the correct format. Failure to do so may result in the response being considered non-responsive.

Respondents must show they have the ability, resources, and capacity to provide the proposed products and services to a substantial majority interested AEPA Member Agencies, as listed in section 4.3 below, or to at least one region for regional solicitations.

Responses must also demonstrate extensive knowledge, background, and a minimum of five years of experience in manufacturing, delivering, installing, maintaining, or supporting the offered products, services, equipment, or software.

AEPA and/or its Member Agencies may accept or reject companies—especially newly formed ones—based on the information provided in the response and/or through their own investigation.

1.4 Solicitation Submittal

Response Preparation: The solicitation is divided into several parts:

- **Part A:** Instructions and technical specifications
- **Part B:** General terms and conditions for all AEPA agencies
- **Part C:** State-specific terms, including procurement rules for each member state
- **Part D:** REQUIRED questionnaire completed in Euna Procurement
- **Part E:** REQUIRED signature form, uploaded in Euna Procurement; the signature form includes multiple areas where signatures are required. Submit the form as one (1) individual form in PDF format.
- **Part F:** REQUIRED pricing workbook, uploaded in Euna Procurement; complete the Excel workbook provided. Be sure to complete the REQUIRED tabs as outlined in Part F.

Additional requirements:

- State-REQUIRED forms, when applicable, as listed in Submission Instructions for Suppliers. Review Part C and submit the required state documents with your offer. Submit all state-specific forms as one (1) form in PDF format.
- Exceptions and Deviations document is REQUIRED and must be appropriately marked "yes" or "no," completed and uploaded
- Exhibit A-Marketing Plan is a REQUIRED document and must be uploaded; there is no template for the Marketing Plan. Vendors may use their own format and upload it as a PDF.
- Additional affirmations are REQUIRED and must be answered within Euna Procurement
- All responses must use AEPA-provided forms in Euna Procurement unless noted otherwise.
- If there is a pricing extension error, unit prices will control.
- All "days" listed refer to calendar days, not business days.
- Respondents must review the entire solicitation, request clarification when needed, and ensure accuracy before submitting. Late withdrawal is not allowed due to preparation errors.
- The organization and clarity of the response will be evaluated as an indicator of the vendor's ability to meet contract requirements.

Solicitation Transmittal

- Respondents are responsible for ensuring their complete submission is uploaded to Euna Procurement by the exact deadline.
- Responses will be opened, and the Opening Record will be posted on the AEPA website.

1.5 Solicitation Evaluation, Approval, and Award

Solicitation responses will be evaluated according to cooperative procurement standards and the procurement laws, policies, and procedures of AEPA Member Agency states, as well as AEPA by-laws and guidelines.

For IFB categories, AEPA will recommend contracts to the lowest responsive and responsible respondents based on the criteria in the solicitation. Final contract awards are made by individual AEPA Member Agencies.

Responsive Offer

A **Responsive Offer** is one that meets all key requirements of the solicitation. Only responsive offers approved by AEPA may be considered for awards by Member Agencies. To be responsive, the offer must:

- Be submitted on time.
- Meet all mandatory requirements in the solicitation.
- Substantially follow all specified requirements as determined by AEPA and its Member Agency representatives.
- Clearly state any deviations or exceptions in writing with the submitted offer. Otherwise, the response is assumed to fully comply.
- Avoid excessive or unreasonable exceptions, which may cause the offer to be rejected. Any statement that the solicitation is not contractually binding will result in disqualification.
- Follow all proposal instructions and include complete written responses, documentation, and required details on qualifications, products, services, and pricing. Failure to do so may result in the offer being deemed non-responsive.

A **Non-responsive Offer** is any offer that does not meet the key requirements of the solicitation. This includes, but is not limited to:

- Offers not submitted through Euna Procurement
- Missing or improperly formatted required documents (signed forms, pricing, catalogs, electronic files, etc.)
- Missing a required security bond (where applicable; if security bond is required it will be listed in the heading of this document)
- Failure to meet qualifications, product specifications, documentation, or pricing requirements

AEPA may request non-pricing documents, waive minor issues, or seek clarification under its approved procedures. Offers deemed non-responsive will not be considered for approval or award.

Responsible Respondent

A **responsible Respondent** is a firm with the qualifications, resources, and ability to perform the contract reliably and with integrity. During evaluation, the category committee may request financial reports to confirm your organization's stability. These may include third-party documents such as balance sheets and profit/loss statements from the past three years, bank credit letters, Dun & Bradstreet reports, or annual financial reports for publicly traded companies.

AEPA approval makes a Respondent eligible for contract consideration by Member Agencies. Responsibility may be determined based on factors including whether the vendor has:

- Submitted a responsive offer
- Adequate financial resources, facilities, personnel, and experience
- A strong record of national performance
- Integrity and a reputation for meeting public agency needs
- Compliance with laws, regulations, and industry standards
- Products and services that meet solicitation specifications
- Provided all required information and documentation

Cost Evaluation

- Cost and price schedules conform to and provide the information required in this part of the bid or proposal.
- Pricing offered that is equal to or better than what they ordinarily offer to individual entities or cooperatives with equal or lesser volume.
- Methodology used by AEPA and its AEPA Member Agencies to approve prospective Vendor Partners and award contracts for a Catalog Bid is as follows: Lowest responsive, responsible Bidder(s) is/are determined based on the price evaluation criteria; and by a "Core List" and/or by creating a "Market Basket Study" to compare overall pricing between Respondents. A "Market Basket" is a list of items typically purchased by AEPA Member Agencies and their Participating Entities that represent a cross-section of the types of those items purchased. The selection and quantity of line items evaluated will be at the sole discretion of the AEPA evaluators. Based on the cost evaluation, a recommendation will be made to approve a single Bidder or make a multiple Bidder award. 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.

1.6 Contract Award and Implementation

An AEPA category committee will conduct an initial review and evaluation of responses and make a recommendation to AEPA for approval. Respondents approved by AEPA become **AEPA Vendor Partners** and may then be considered by individual Member Agencies for contract awards.

All respondents will be notified of the solicitation results, and vendors recommended for award will be posted on the AEPA website.

After AEPA Board approval, Member Agencies will receive the Part E contract forms to complete and send to the Vendor Partner. Each Member Agency will decide independently whether to award a contract.

If needed and allowed by state law, the Vendor Partner and Member Agency may complete final contract negotiations to address state-specific details such as:

- Contract execution and implementation
- Signing the contract
- Marketing and rollout plans
- Order processing and reporting
- Day-to-day contract management responsibilities

Approval by AEPA does not guarantee that every Member Agency will award a contract. Each Member Agency makes the final decision.

2. Responsibilities of a Vendor Partner

As an approved AEPA Vendor Partner, the following support is expected:

- Assign a dedicated senior-level contract manager for each Member Agency account who understands the contract and can make decisions.
- Train sales staff on AEPA contract pricing, eligible purchasers by state, contract terms, and ordering procedures. Vendor Partners are expected to prioritize AEPA contracts.
- Develop a marketing plan with Member Agencies, including website promotion, email campaigns, flyers, brochures, catalogs, and other materials.
- Create an AEPA-specific sell sheet that allows space for each Member Agency's logo and contact information.
- Submit quarterly sales and administrative fee reports to each Member Agency, along with paying the respective administrative fees to Member Agencies. A $0 report is required even if no sales occurred.
- Report sales and fees to AEPA by state if requested.
- Maintain regular communication with the Category Committee Chair, Member Agencies, and participating entities.
- Attend two AEPA meetings each year: the Annual Meeting (April/May) and the Winter Meeting (November). Participation requires paid registration.
- Support trade shows and conferences to promote AEPA contracts, such as ASBO, NIGP, and NAEP.
- Work to increase sales throughout the contract term with all participating Member Agencies.

3. Responsibilities of AEPA Member Agencies

To support Vendor Partners and their contracts, each AEPA Member Agency is expected to:

- Assign staff to serve as the main contact for the AEPA program in that state.
- Work with the Vendor Partner to develop the best marketing plan for the state, including sales training, website promotion, email outreach, brochures, and other efforts.

- Create marketing materials that highlight awarded contracts, such as flyers, catalogs, mailings, and electronic communications.
- Help jointly promote the contract to eligible participating entities within the state.
- Identify eligible participating entities and possibly provide a list of potential customers.
- Collaborate with the Vendor Partner to manage costs related to fulfilling the contract.
- Attend the two annual AEPA meetings to interact with Vendor Partners.

4. Specifications

4.1 Scope of Bid

This category includes:

School & Instructional Supplies, including classroom and meeting room supplies, printing, art supplies, discipline-specific teaching aids and supplies for age specific instruction from early childhood to adult.

General office supplies, office electronics, office technology, paper products, miscellaneous equipment, specialty equipment and supplies, breakroom and custodial supplies, shipping/mailing room supplies.

Types of services may include but are not limited to copy, print services, imprinted promotional items, and installation and support services normal to a Office, School & Instructional Supplies and Equipment catalog.

AEPA and Member Agencies are seeking respondents for vendors with a comprehensive array of products (distribution catalog), and because of the broad nature of this category, AEPA seeks bidders whose business concentrates on a specialty area or subset of Office, School, Instructional Supplies and Equipment.

Examples of specialty categories include but are not limited to 1) Shipping and Packing Supplies, 2) STEM/STEAM, 3) Art, 4) or Special/Alternative Education.

This category does not include custom or specialty furniture. AEPA has a separate awarded bid specifically for office and school furniture.

This category may include AI-enabled solutions, if included in a broad based catalog of office and school supplies. Specific digital AI software solutions as standalone responses will not be accepted in this category. AEPA has a separate concurrent RFP for classroom and student related AI-native solutions, and a separate category for digital resources.

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

4.2 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 B – General Terms and Conditions under "Pricing."

This bid is considered a:

YES	NO	TYPE OF BID
X		**CATALOG:** 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	**LINE ITEM/CONSTRUCTION:** A construction/installation 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.

4.3 Anticipated AEPA Member Agency Participation

State	Participate?	Other States Member Sells In
Arkansas	Yes	
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, TN
Massachusetts	Yes	
Michigan	Yes	
Minnesota	Yes	SD
Missouri	Yes	OK, TN
Montana	Yes	ID

Nebraska	Yes	SD
New Jersey	No	
New Mexico	Yes	
North Carolina	Yes	
North Dakota	Yes	SD
Ohio	Yes	
Oregon	Yes	
Pennsylvania	Yes	DE, HI, MD, NY
South Carolina	Yes	
Texas	Yes	
Virginia	Yes	
Washington	No	AK, ID
West Virginia	Yes	
Wisconsin	Yes	
Wyoming	Yes	SD, UT

Participation by an AEPA Member Agency in this solicitation does not guarantee that it will award a contract to an AEPA-approved Vendor Partner. Each Member Agency will make its own final decision after reviewing the responses and AEPA's recommendation.

4.4 Anticipated Volume

Office, School, Instructional Supplies and Equipment is a combined category of two previously separate AEPA categories. The resulting bid will be an Indefinite Delivery, Indefinite Quantity (IDIQ) contract(s). AEPA Member Agencies estimate approximately **$65 million or greater** in sales in the first contract term based on existing sales from currently held contracts. 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.

4.5 Informational Pre-Bid Conference Call

AEPA will hold an informational pre-bid conference call for interested bidders. The first call will provide general information about AEPA and allow questions. Separate calls will then be held for each solicitation category, focused on the specific bids in this cycle.

Call times are scheduled for all four U.S. time zones, and no pre-registration is required. A recording will be posted on the AEPA website.

Informational Pre-Solicitation Conference Call Schedule (All Categories)
July 9, 2026

Solicitations	Eastern	Central	Mountain	Pacific
AEPA 027 Informational Pre-Bid Conference Call - All Categories	11:00 AM	10:00 AM	9:00 AM	8:00 AM
Maintenance, Repair and Operations	12:30 PM	11:30 AM	10:30 AM	9:30 AM
Custodial Supplies and Equipment	1:00 PM	12:00 PM	11:00 AM	10:00 AM
Office, School and Instructional Supplies	1:30 PM	12:30 PM	11:30 AM	10:30 AM
Technology Buyback	2:00 PM	1:00 PM	12:00 PM	11:00 AM
Athletic Supplies and Equipment	2:30 PM	1:30 PM	12:30 PM	11:30 AM
PK-12 AI Solutions	3:00 PM	2:00 PM	1:00 PM	12:00 PM
Promotional Items	3:30 PM	2:30 PM	1:30 PM	12:30 PM

Conference Call Number/Online Connection:
https://us06web.zoom.us/j/81478231398?pwd%3DoPNSwIi92cRnq3PKUHooNXbEb7W4Cc.1&sa=D&source=calendar&ust=1772058874763811&usg=AOvVaw0mHodbCQ3FtjIb2RfU9yri
Meeting ID: 814 7823 1398
Passcode: 993838
Dial In Information: +13052241968

4.6 Glossary of Terms and Abbreviations
Abbreviations and Acronyms for Standards and Regulations: Any abbreviations or acronyms used in the specifications or contract documents refer to the recognized organizations responsible for the listed standards and regulations. Contact information and websites (if any) may change but are current as of the contract document date.

4.7 General Specifications

Item	Description
4.7.1	The Vendor Partner will have access to a full inventory of the awarded product line.
4.7.2	The Vendor Partner shall maintain a minimum monthly overall average fill rate of 95% or above. Items that are reordered, backordered, or partially filled are not considered filled items when calculating this service level. 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.

4.7.3	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.
4.7.4	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 resale 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.
4.7.5	All charges and components necessary for the 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 request.
4.7.6	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. A request form will be available for adding additional independent agents/distributors, subcontractors and/or third-party agents after the solicitation due date, and throughout the term of the contract. The Vendor Partner will submit the completed form to the Category Chair for consideration and determination.
4.7.7	Optional services must be identified separately and must include clear descriptions of proposed services.
4.7.8	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.
4.7.9	Vendor partners will be required to provide their complete product offerings in an electronic catalog upon request.
4.7.10	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.
4.7.11	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.
4.7.12	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.
4.7.13	Products that have a money back guarantee will be clearly identified in the catalog and on the web site (if applicable).

4.7.14	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.
4.7.15	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 the cost of any returned product due to a pricing error.
4.7.16	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.

4.8 Product | Category Specific Specifications

Item	Description
4.8.1	If responding with a distributor catalog, the catalog includes a variety of manufacturers of specified products and services, and 80% or more of the catalog is dedicated to Office, School & Instructional Supplies. Specialty catalogs must fall under the scope of this IFB.
4.8.2	All equipment, supplies, parts, products, etc. will meet applicable safety and industry standards, laws and regulations.
4.8.3	The Vendor Partner should meet innovative and responsible environmental practices through their company to reduce their carbon footprint, reduce waste, energy conservation, and ensure efficient computing and much more.

4.9 Shipping and/or Freight

Item	Description
4.9.1	Orders that are $100.00 or more shall include shipping, unless clearly noted otherwise in the bid response. Vendor shall bid a flat rate for all orders that are less than $100.00 regardless of where it is to be shipped in the Continental United States. Vendor must specify if there is charge for shipping and/or minimum order amount if other than noted in this section.

5. Pricing [Below is the full descriptions of pricing applicable to catalog bids only.]

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:

5.1 Primary Pricing Strategies: All Bidders will be required to submit "Primary Pricing" in the form of either "Catalog Pricing" or "Line-Item Pricing." Bidders are also encouraged to offer OPTIONAL pricing strategies including "Hot List" and "Volume Discounts."

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.

- **Discounts:** Discount offers must clearly identify percent 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. Discounts should be identified as a single minimum discount percentage for each line; ranges of discounts, or discount averages, will not be allowed on a single line.
- **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, using the appropriate form, for review and approval prior to release to all AEPA Member Agencies. Prices may change based on manufacturers' price changes, new published pricing or price lists, but the original discount bid shall remain firm for the duration of the contract.
- **Core List:** In a Catalog Priced bid, a category (e.g.-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 are 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.
- **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.
- **New products or manufacturers** added after the award may only be included if they fall within an established percentage discount category of the original bid submission. Alternatively, for new products or manufacturers not included in the original bid submission, the bidder must stipulate a minimum catalog discount on Tab F.1 of the Part F Pricing Workbook, that would apply to new products or manufacturers. Bidder may stipulate discounts off specific brands or lines of goods or state a minimum discount that would apply universally to any additions made after the original bid submission (see Sample below). Products that do not align with either of these existing discount structures cannot be added.

Association of Educational Purchasing Agencies	**Part F.1 – Catalog Discount for Items in a Commercially Available Catalog**		
	AEPA #XXX-X Widget Equipment and Supplies		
Bidding Company Name:	*Acme Widget Company*		
Name of Catalog:	*Special Widgets*		
Note: Groupings to be defined by Bidder and can be by sub-category, manufacturer, etc.			
			Part F.1 is a SAMPLE FORM
No.	**Grouping of Discount**	**Discount Offered**	**Comments**
1	Blue Special Widgets	15%	
2	Green Special Widgets	14%	
3	Red Special Widgets	16%	
4	Any new products or manufacturers added after initial bid	5%	This is a minimum discount. Actual discounts at the time products or manufacturers are added may be at a higher discount percentage.
5			

A. Secondary Pricing Methods (Catalog Bids only--Bidders are allowed to offer Customized Price Lists (Catalog Bids ONLY) and are encouraged to offer Hot Lists and Volume Discounts as follows:

- **Customized Price List:** Bidders are allowed 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:
  - 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.
  - 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.
  - 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)
  - Items may not include special order or customized service products unless agreed to by the Vendor Partner.

- **Hot List Pricing:** Bidders are invited, at their option, to offer a selection of products/services, defined as a Hot List, at greater discounts than those listed in the standard catalog or core list discounts. Special, time-limited reductions are permissible under the following conditions: The price reduction is available to all AEPA Member Agencies equally. The price reduction is for a specific time period, no less than thirty (30) days. May be used to discount and liquidate close-out and discontinued products/services as long as those items are clearly labeled as such. The original price for products/services may not be exceeded after the time limit. The AEPA Category Committee and all AEPA Member Agencies shall be notified of any special or time limited price reduction. New prices must be on record fifteen (15) days prior to any offer of the new prices being proposed or offered to AEPA Member Agencies and Participating Entities. Pricing for all Hot List items must be updated on the Vendor Partner's online

catalog and submitted to all AEPA Member Agencies in an electronic format that can be posted to websites, emailed and shared with Participating Entities/Buyers.

- **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), e.g.-. 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.

B. Part F - Pricing Workbook

- Pricing shall be completed on the provided pricing sheets (Microsoft Excel Workbook) with the individual tables to be completed as follows:
  - F.1 – Catalog Discounts (Required)
  - 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)
  - 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)
  - F.3 – Services Price Schedule (Optional)
  - F.4 – Volume Discounts (Optional)
- The Catalog Category Discount and the Core Items award will not be split. Bid pricing will be evaluated on a combination of items from both the Core List and Non-Core List Price Schedules.
- 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.
- Bidders are instructed to include warranty information and incidental charges and fees on Table F.3 of the Part F Pricing Workbook or on additional sheets in the Excel pricing document. Bidders may not charge incidental charges or fees unless such incidental charges and fees are included in the bid. Responses such as "negotiable" or "to be determined" are not acceptable and will be treated as if Bidder did not include such incidental charges or fees in their bid.

6. Evaluation

The AEPA category committee will evaluate bid responses based on the full submission and the criteria in Part B defining **responsive and responsible** bids.

To determine responsibility, the committee may request financial reports showing the organization's stability. Accepted documents may include three years of balance sheets and

profit/loss statements, bank credit letters, Dun & Bradstreet reports, or annual financial reports for publicly traded companies.

The committee may recommend awarding one bidder or multiple bidders based on differences in products or services. AEPA will vote to accept or reject the recommendation. Approved bids will then be sent to individual states for contract approval.

Pricing evaluation may also consider total acquisition cost and best value, including life-cycle costs, total cost of ownership, quality, and how well the offering meets AEPA members' needs.

Evaluation Criteria
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