

INVITATION FOR BID

AEPA IFB #015-B Instructional & School Supply Catalog

PART C – BID FORMS

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BID SUBMITTAL INSTRUCTIONS

1. Bid submission instructions can be found in Part A: Terms and Conditions, Section II, F: Bid Submission of this solicitation. Bidders are reminded that failure to follow, comply with, and adhere to these instructions of this solicitation may result in their response being deemed non-responsive.
2. It is the bidder’s responsibility to ascertain that all documents submitted have been saved completely and appropriately to the CD or flash drive. Bidders should test both of the CDs or flash drives on computers independent from the system on which they were created to make sure the documents can be opened. Electronic media that cannot be opened by the bid committee may result in the rejection of the proposal.
3. AEPA, its member agencies, affiliate agencies and authorized representatives are not responsible for bid proposals that are incomplete, unreadable or received after the deadline.

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INSTRUCTIONAL & SCHOOL SUPPLIES
Bid Proposal Table of Contents

Bidder _____

Name of Authorized Representative _____

Office Address _____

Time Zone: Eastern Central Mountain Pacific

Telephone _____ **Fax** _____

Email _____ **Website** _____

Instructions: Please complete the table below with the information for the documents included in this bid proposal. The bidder is reminded that two identical copies of this material on electronic media, either two (2) CDs or two (2) flash drives, are required.

Form	Folder	Document Title on CD or Flash drive	Format (i.e., Word, PDF, Excel)	Notes
Table of Contents	A		PDF	
FORM A Bid Affidavit	A		PDF and hard copy	Signature and notarization required.
FORM B Acceptance of Bid & Contract Award	A		PDF and hard copy	Signature required.
FORM C Serv.Questionnaire	A		PDF	Signature required
FORM D Company Info	A		PDF	Signature required
Letter of Line of Credit or Annual Report (See Form D)	A		PDF	
FORM E Exceptions-T & Cs	A		PDF	Signature required
FORM F Deviations	A		PDF	Signature required
Part B-Specifications	A			
State Specific Required Forms (See Part A)	A		PDF	
Bid Security (If required)	A		PDF and hard copy	
FORM G Discount & Pricing Schedules	B		PDF	Signature required
Excel Workbook- FORM G Discount & Pricing Schedules	B		Excel	
G.5 Warranties, Additional Services (Optional)	B		PDF	
G.6 Additional Discounts (Optional)	B		PDF	
Catalogs/price lists	B		PDF	

AEPA FORM B: ACCEPTANCE OF BID AND CONTRACT AWARD

AEPA IFB #015-B

INSTRUCTIONAL & SCHOOL SUPPLIES

NAME OF BIDDER _____

INSTRUCTIONS: PART I of this form is to be completed by the Bidder and signed by its Authorized Representative. PART II will be completed by the AEPA Member Agency only upon the occasion of the bid award. The completed document must be scanned to a PDF format and saved to Folder A, and a **completed and signed paper version must be included in the package**. If approved by AEPA, the bidder is required to produce a copy of the document for each of the AEPA Member Agency with which it contracts.

PART I: BIDDER

In compliance with the Invitation For Bid (IFB), the undersigned warrants that I/we have examined the Instructions to Bidders, associated documents, and being familiar with all of the conditions surrounding the proposed projects, hereby offer and agree to furnish all labor, materials, supplies and equipment incurred in compliance with all terms, conditions, specifications and amendments associated with this IFB and any written exceptions to the bid. Signature also certifies understanding and compliance with the certification requirements of the AEPA Member Agency’s Terms and Conditions and/or Special Terms and Conditions. The undersigned understands that their competence, ability, capacity and obligations to offer and provide the proposed tangible personal property, professional services, construction services and other services on behalf of the Vendor Partner as well as other factors of interest to the AEPA Member Agency as stated in the evaluation section, will be a consideration in making the award.

Company Name _____ Date _____

Company Address _____ City _____ State _____ Zip _____

Contact Person _____ Title _____

Authorized Signature (ink only) _____ Title _____

Email Address _____ Phone _____

PART II: AWARDING MEMBER AGENCY

Your bid response for the above identified bid is hereby accepted. As a Vendor Partner you are now bound to offer and provide the products and services identified within this IFB, your response and approved by AEPA, including all terms, conditions, specifications, exceptions and amendments. As Vendor Partner, you are hereby not to commence any billable work or provide any products or services under this contract until an executed purchase order is received from the AEPA Member Agency or Participating Entities. The intent of this contract is to constitute the final and complete agreement between the AEPA Member Agency and Vendor Partner, and no other agreements, oral or otherwise, regarding the subject matter of this contract, shall bind any of the parties hereto. No change or modification of this contract shall be valid unless in writing and signed by both parties to this contract. If any provision of this contract is deemed invalid or illegal by any appropriate court of law, the remainder of this contract shall not be affected thereby. The initial term of this contract shall be for up to fifteen (15) months and will commence on the date indicated below and continue until February 28, 2016 unless terminated, canceled or extended. By mutual written agreement as warranted, the contract may be extended month by month up to six (6) months or for three (3) additional 12-month periods.

Awarding Agency _____

Agency Executive _____

Awarded this _____ day of _____ Contract Number _____

Contract to commence (Member Agency to select): _____ or March 1, 2015
(Enter date)

AEPA FORM C: SERVICE QUESTIONNAIRE FOR BIDDER

**AEPA IFB #015-B
INSTRUCTIONAL & SCHOOL SUPPLIES**

NAME OF BIDDER _____

Instructions: Please respond to Yes/No and choice questions by using an (X). If a text reply is required, respond in the space below. Scan this form and any attachment pages into a single document and convert to a PDF file. Follow the instructions for titling the file and file organization under Part A, Section II Bid Procedures, F. Bid Submission, 2. Format of Bid Submittal.

Note: As part of evaluating the Bidder’s qualifications, the following is being requested and the Bidder is forewarned failure to respond and/or meet the minimum specifications in these areas, may deem their response as non-responsive.

1. The following chart indicates which AEPA Member States intend to participate in this bid category. Please place an “X” in response to questions in the last three (3) columns. *Note: A Bidder must be willing and able to deliver the proposed products and/or services to ninety (90%) of the participating AEPA Member States.*

AEPA Member States	Participate in this bid category?	Has your company sold these products/services in these states for the PAST THREE YEARS?	If awarded a contract, which states does your company PROPOSE TO SELL IN?	Indicate which states your company has sales reps, distributors or dealers in.
California	Yes			
Colorado	Yes			
Connecticut	Yes			
Florida	Yes			
Indiana	Yes			
Iowa	Yes			
Kansas	Yes			
Kentucky	Yes			
Massachusetts	Yes			
Michigan	Yes			
Minnesota	Yes			
Missouri	Yes			
Montana	Yes			
Nebraska	Yes			
New Jersey	Yes			
New Mexico	Yes			
North Dakota	Yes			
Ohio	Yes			
Oregon	Yes			
Pennsylvania	Yes			
Texas	Yes			
Virginia	Yes			
Washington	No			
West Virginia	Yes			
Wisconsin	Yes			
Wyoming	Yes			

2. e-commerce: Does this company have an e-commerce website? _____ YES _____ NO

If **YES**, what is the website? _____

3. **Customer and Support Service:** It is understood depending on the type, kind and level of products and/or services being proposed in response to this bid will impact and determine the type and level of services required and these are identified in Part B Bid Specifications of this IFB.

a. Does this company have online customer support option? _____ **YES** _____ **NO**

b. Does this company have a toll-free customer support phone option? _____ **YES** _____ **NO**

c. Does this company offer local customer and support service options? _____ **YES** _____ **NO**

d. Describe the type, level, available and location(s) of your customer and support service options, including number of dedicated customer/support staff and hours of operation.

4. **Training:** If applicable, does this company offer customer training for the products and services sold?

_____ **YES** _____ **NO**

If **YES**, describe what types/kinds of training you offer, the venues where training occurs and the location(s) of your trainers, include number of staff dedicated to training and their qualifications and hours of operation.

5. **Pricing:**

a. Is your pricing methodology guaranteed for the term of the contract? _____ **YES** _____ **NO**

b. Will you offer customized price lists to Participating Entities as required per the Pricing terms of Part A? _____ **YES** _____ **NO**

c. Will you offer hot list pricing (optional) as described in the Pricing terms of Part A? _____ **YES** _____ **NO**

d. Will you offer Volume Price Discounts as described in the Pricing terms of Part A? _____ **YES** _____ **NO**

6. **Competitiveness:** In order for your bid to be considered, your company must offer AEPA prices that are equal to or lower than what your company offers to individual customers and/or cooperatives with equal to or lower volume. Is the pricing that is proposed to AEPA equal to or lower than pricing offered to individual customers and/or cooperatives with equal to or lower volume? _____ **YES** _____ **NO**

Indicate which of the following apply and the **level of competitive range** you are offering in response to this IFB.

_____ Pricing offered to AEPA is EQUAL TO pricing offered to individual customer and/or cooperatives.

_____ Pricing is LESS THAN individual customer and/or cooperatives. Lower by _____ %

7. **Cooperative Contracts:** Does your company currently have contracts with other cooperatives (local, regional, state, national)? _____ **YES** _____ **NO**

If YES, identify which cooperatives and the respective expiration date(s).

If YES and your company is awarded an AEPA Contract, which contract will you lead with in marketing and sales representative presentations (sales calls)?

8. **Administrative Fee:** Which of the following best reflects how your pricing includes the individual AEPA Members' administrative fee.
- a. _____ The pricing for the products and/or services are the same for each AEPA Member Agency, shipping, handling administrative fee and other specific state costs are added to arrive at total price offered to the Individual AEPA Member Agency.
 - b. _____ The pricing for the products and/or services is inclusive of the administrative fee and therefore the pricing is the same for all AEPA Member Agencies. Shipping, handling and other state specific costs are added to adjusted the AEPA Member Agency's price.
 - c. _____ The pricing for the products and/or services includes all (shipping, handling, administrative fee, other) costs to arrive at a single price for all AEPA Member Agencies.

9. **Shipping & Handling:**

Orders that are \$50.00 or more shall include free shipping and handling. What is the flat rate your company will charge, regardless of where shipped in the continental United States, for orders less than \$50.00?

\$ _____

10. **Product Returns:** Does your company have a return policy? _____ **YES** _____ **NO**

If **YES**, describe your return policy and if you charge a restocking fee, what is it? (AEPA allows up to 15% for supplies and up to 25% for equipment).

11. **Payment Terms:** Will you offer AEPA Buyer's a quick pay discount? _____ **YES** _____ **NO**

If **YES**, what is the discount? _____% Net _____

12. **Leasing:** Do you offer leasing arrangements under this bid? _____ **YES** _____ **NO**

If **YES**, remember to indicate the rate factor and other cost factors on the Pricing spreadsheet(s).

13. **If an AEPA contract is approved and awarded by the Member Agencies, as a Vendor Partner, I agree to:**

No.	Responsibilities of an AEPA Vendor Partner	Yes	No
1	Designate and assign a dedicated senior-level contract manager (one authorized to make decisions) to each of the Member Agency accounts. This employee will have a complete copy and must have working knowledge of the contract.		
2	Train and educate sales staff on what the AEPA cooperative contract is including pricing, who can order from the contract (by state), terms/conditions of the contract and the respective ordering procedures for each state. It is expected that Vendor Partners will lead with AEPA contracts.		
3	Develop a marketing plan to support the AEPA contract in collaboration with respective AEPA Member Agencies. Plan should include, but not be limited to, a website presence, electronic mailings, sales flyers, brochures, mailings, catalogs, etc.		
4	Create an AEPA-specific sell sheet with a space to add a Member Agency logo and contact information for use by the Member Agencies and the Vendor Partner's local sales representatives to market within each state.		
5	On a quarterly basis, complete the sales and administrative fee report (see attached PDF example) and submit to each Member Agency along with the respective administrative fees to be paid. If there are no sales, a \$0 report is required.		

6	On a quarterly basis, complete the online Vendor Partner sales report for each Member Agency.		
7	Have ongoing communication with the Bid Oversight Chairperson, AEPA Member Agencies and the Member Agencies Participating Entities.		
8	Attend two (2) AEPA meetings each year (see page 9 in Part A)		
9	Participate in national and local conference trade shows to promote the AEPA contracts including, but not limited to the Association of School Business Officials (ASBO), the National Institute of Governmental Purchasing (NIGP), and the National Association of Educational Procurement (NAEP).		
10	Increase sales over the term of the contract with all participating AEPA Member Agencies.		

Signature _____

Must be same signature as on Bid Affidavit Signature and Acceptance Forms

AEPA FORM D: COMPANY INFORMATION

**AEPA IFB #015-B
INSTRUCTIONAL & SCHOOL SUPPLIES**

NAME OF BIDDER _____

COMPANY CONTACT INFORMATION

Company Name: _____ Website: _____

Company Address: _____

City: _____ State: _____ Zip: _____

Contact Person: _____ Title: _____

Contact Phone: _____ Contact Email: _____

BACKGROUND

Note: Generally, AEPA will not accept an offer from a business that is less than five (5) years old or which fails to demonstrate and/or establish a proven record of business. If the bidder has recently purchased an established business or has proof of prior success in either this business or a closely related business, provide written documentation and verification in response to the questions below. AEPA reserves the right to accept or reject newly formed companies based on information provided in this response and from its own investigation of the company.

This business is a public company privately owned company.

In what year was this business started under its present name? _____

Under what other or former name(s) has your business operated? _____

Is this business a corporation? No Yes. If yes, please complete the following:

Date of incorporation: _____ State of incorporation: _____

Name of President: _____

Name(s) of Vice President(s): _____

Name of Secretary: _____

Name of Treasurer: _____

Is this business a partnership? No Yes. If yes, please complete the following:

Date of organization: _____ State founded: _____

Type of partnership, if applicable: _____

Name(s) of general partner(s): _____

Is this organization individually owned? No Yes. If yes, please complete the following:

Date of organization: _____ State founded: _____

Name of owner: _____

This organization is a form other than those identified above. No Yes.

IF THE ANSWER IS YES, describe the company's format, year and state of origin, and names and titles of the principals.

COMPANY HEADQUARTER LOCATION

Company Address: _____

City: _____ State: _____ Zip: _____

Main Phone Number: _____ How long at this address? _____

COMPANY BRANCH LOCATIONS

Branch Address: _____

City: _____ State: _____ Zip: _____

Branch Address: _____

City: _____ State: _____ Zip: _____

Branch Address: _____

City: _____ State: _____ Zip: _____

Branch Address: _____

City: _____ State: _____ Zip: _____

If more branch locations, insert information here or add another sheet with above information.

SALES HISTORY

Provide your company's annual sales for 2011, 2012 and 2013 YTD in the United States by the various public segments:

	2011	2012	2013 YTD
K-12 (public & private), Educational Service Agencies	\$	\$	\$
Higher Education Institutions	\$	\$	\$
Counties, Cities, Townships, Villages	\$	\$	\$
States	\$	\$	\$
Other Public Sector & Non-profits	\$	\$	\$
Private Sector	\$	\$	\$
TOTAL	\$	\$	\$

WORK FORCE

1. Key Contacts and Providers: Provide a list of the individuals, titles, and contact information for the individuals who will provide the following services on a national and/or local basis:

Function	Name	Title	Phone	Email
Contract Manager				
Sales Manager				
Customer & Support Manager				
Function	Name	Title	Phone	Email
Distributors, Dealers, Installers, Sales Reps				
Consultants & Trainers				

Technical, Maintenance
& Support Services

Quotes, Invoicing &
Payments

Warranty & After the
Sale

Financial Manager

2. **Sales Force:** Provide total number and location of salespersons employed by your company in the United States by completing the following: *(To insert more rows, hit the tab key from the last field in the State column.)*

Number of Sales Reps	City	State

3. **Service/Support and Distribution Centers:** Provide the type (service/support or distribution) and location of centers that support the United States by completing the following: *(To insert more rows, hit the tab key from the last field in the State column.)*

Center Type	City	State

4. **In-house Resources:** Describe the business's current in-house workforce, equipment and facilities available to perform under this solicitation.

MARKETING

1. **Key Marketing Contact(s):** List the name(s), title(s) and contact information of the business's key national and regional marketing office(s). *(To insert more rows, hit the tab key from the last field in the State column.)*

Name	Title	Phone	Email

2. **Marketing Activities:** Describe how this company marketed its products and services to schools and other public sector audiences in Fiscal Year 2012 – 2013 (July 1 – June 30). List all conventions, conferences and other events at which this company exhibited.
-
-

3. **Cooperative Marketing:** Describe ways in which this business can collaborate with Member Agencies in marketing the bid.

-
-
4. **Sales Training:** Explain how your company will education your sales staff on the AEPA contract including timing, methods, etc.
-
-

ENVIRONMENTAL INITIATIVES

1. Describe how your products and/or services support environmental goals.
-
-

2. Describe the company’s “green” objectives (i.e. LEED, reducing footprint, etc.).
-

INDEPENDENT SUBCONTRACTORS, DISTRIBUTORS, INSTALLERS, ETC.

If the Bidder is not the sole provider of all goods and services provided under this contract, the following must be answered:

1. **Selection Criteria for Independent Providers:** Describe the criteria and process by which the business selects, certifies and approves subcontractors, distributors, installers and other independent services.
2. **Current Subcontractors, Distributors, Installers, Etc.:** Provide a list of current subcontractors, distributors, installers and other independent service providers who are contracted to perform the type of work outlined in this bid in the member agency states (listed in Part A of this IFB). Include, if applicable, contractor license information and the state(s) wherein they are eligible to provide services on behalf of this business.

DISCLOSURES






1. **Letter of Line of Credit or Annual Financial Report (REQUIRED):** Attach a letter from the business’s chief financial institution indicating the current line of credit available in its name and evidence of financial stability for the past three calendar years (2010, 2011 and 2012). This letter should state the line of credit as a range (ie., “credit in the low six figures” or “a credit line exceeding five figures”). If company is a publicly traded company a complete Annual Financial Report is required in place of Line of Credit Letter.
2. **Legal:** Does this business have actions currently filed against it? No Yes.

IF YES, AN ATTACHMENT IS REQUIRED: List and explain current actions such as Federal Debarment (on US General Services Administration’s “Excluded Parties List”), appearance on any state or federal delinquent taxpayer list, or claims filed against the retainage and/or payment bond for projects.

REFERENCES

Provide contact information of your company’s ten largest public agency customers:

Agency	Name	Title	Phone Number	Email
1.				
2.				
3.				
4.				

- 5. 
 - 6. 
 - 7. 
 - 8. 
 - 9. 
 - 10. 
-

Signature _____
Must be same signature that appears on the Bid Affidavit Signature and Acceptance Form

AEPA FORM E: EXCEPTIONS TO TERMS AND CONDITIONS

**AEPA IFB #015-B
INSTRUCTIONAL & SCHOOL SUPPLIES**

NAME OF BIDDER _____

INSTRUCTIONS:

1. If “no” is checked below, complete this form by signing it at the bottom.
2. If “yes” is checked below, either insert answers into this form or create a facsimile in a Microsoft Word table format to provide narrative explanations of exceptions. If creating a facsimile, the bidder is reminded to use the heading above, and include the bidder name and signature at the end.
3. If adding pages, the bidder’s name and identifying information as to which item the response refers must appear on each page.
4. Scan this form plus any attachments into a single PDF document.
5. Title the file as per the instructions under Part C (this section), page 2, and save to Folder A.
6. Exceptions to local, state or federal laws cannot be accepted under this bid.

- NO**, this bidder does not have exceptions to the Terms and Conditions incorporated in Parts A or B of this IFB.
- YES**, this bidder has the following exceptions to the Terms and Conditions incorporated in Parts A and/or B of this IFB.

IFB Section and Page	Outline Number	Term or Condition	Exception

Signature _____
Must be same signature that appears on Bid Affidavit and Acceptance Forms

AEPA FORM F: DEVIATIONS

**AEPA IFB #015-B
INSTRUCTIONAL & SCHOOL SUPPLIES**

NAME OF BIDDER _____

INSTRUCTIONS:

1. If “no” is checked below, complete this form by signing it at the bottom.
2. If “yes” is checked below, either insert answers into this form or create a facsimile in a Microsoft Word table format to provide narrative explanations of exceptions. If creating a facsimile, the bidder is reminded to use the heading above, and include the bidder name and signature at the end.
3. If adding pages, the bidder’s name and identifying information as to which item the response refers must appear on each page.
4. Scan this form plus any attachments into a single PDF document.
5. Title the file as per the instructions under Part C (this section), page 2, #5. Save to Folder A.
6. Exceptions to local, state or federal laws cannot be accepted under this bid.

- NO**, this bidder does not have deviations (exceptions or alternates) to the specifications listed in Part A, Form F.
- YES**, this bidder has the following deviations to the specifications listed in Part A, Form F.

Outline Number from Part B	Specification (describe)	Details of Deviation

Signature _____
Must be same signature that appears on Bid Affidavit and Acceptance Forms

AEPA BID FORM G: PRICING SCHEDULE SUBMITTAL INSTRUCTIONS

AEPA IFB #015-B INSTRUCTIONAL & SCHOOL SUPPLIES

NAME OF BIDDER _____

INSTRUCTIONS: *Bidders are reminded as they prepare the discount pricing schedule that they are responsible for administrative fees on purchases to be remitted to Member Agencies. (See Part A of this IFB, Pricing.)*

1. There is one (1) Excel Workbook provided for Bidders to complete with your discounts, pricing, etc. Please note that there are several tabs in the Workbook that should be completed. You must use the provided Excel Workbooks. Pricing must be submitted in the Excel Workbook format with the file name “*Bidder Name Form G—Pricing - Description.*”
2. In addition to the provided Excel Workbooks, copies of the bidder’s most recent catalog or pricelist showing the products available under this bid should be included as PDF documents.
3. Save all documents to Folder B.

These forms are provided on *individual tabs* on the Excel Workbook provided on the AEPA website:

G.1. Catalog Discount for Items in a Commercially Available (REQUIRED)

Complete a form for each catalog bid, reset the ‘print area’ if lines were added, and save the file according to directions. If bidding multiple catalogs, a separate form **MUST** be submitted for each catalog. Copy the original tab and change the tab name to identify the different catalogs bid.

G.2A Core Items Price Schedule (REQUIRED)

Use this tab of the workbook to provide the Bid Discount Percentage and item information for all of the listed core items. Be sure to complete Form G.2B for non-core item pricing and item information.

G.2B Non-Core Price Schedule (REQUIRED)

Use this tab of the workbook to provide the item information and the Net Effective Bid Price for all non-core items in your catalog. If bidding multiple catalogs, a separate form **MUST** be submitted for each catalog. Copy the original tab and change the tab name to identify the different catalogs bid. The information may be downloaded from your computer system, but must comply with our format.

G.3 Services Price Schedule (OPTIONAL)

If your company provides any design, installation, training or support services to support the items you are bidding, use this form to provide your bid prices.

G.4 Volume Discounts Schedule (OPTIONAL)

Use this form if your company is offering additional discounts off of the base discounts bid for one time purchases **AND** for public agencies that group their requirements together (based on their estimated total annual spend for commodity). Each Bidder must specify the dollar ranges required in order for the agency(ies) to receive the additional discount.

Use this tab of the workbook to provide the item information and the Net Effective Bid Price for **ALL ITEMS**

Additional Forms that may be provided by Bidder:

G.5. (Not Provided – Bidder Created) Warranties, Additional Services or Incidental Price Schedule: Provide a price schedule for any and all extended warranties, additional or incidental services, products, equipment and/or supplies.

G.6. (Not Provided – Bidder Created) Additional Discounts: If additional discounts/bonuses are available to AEPA members based on a dollar volume, sizes of orders or other criteria, state the formula for arriving at these discounts:

Signature _____

Must be same signature as on Bid Affidavit Signature and Acceptance Form