

Invitation for Bid AEPA IFB #020-C DIGITAL RESOURCES & INSTRUCTIONAL MATERIALS

Part B – Technical Specifications

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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 28) in the category of Digital Resources & Instructional Materials.

- a. Respond to request from a number of different types of educational, governmental and public institutions seeking Digital & Instructional Materials that will both support and integrate into classroom instruction and learning.
- b. These parts and supplies will include but are not limited to: Library resources for purposes of information literacy, automation, and access to reference materials and eBooks; licensing of digital & print textbooks and supporting materials; access to online professional development & training resources through video, audio, and other formats; licensing of Learning Management systems to support classroom instruction and learning through the delivery of materials and resources for the support of anytime anywhere learning; and licensing or purchasing of video conferencing software and hardware..
- c. Types of services may include, but are not limited to Digital/Print Instructional/Classroom Content and materials (Multimedia/Video content, Courseware/online lessons, Game-Based Learning, Virtual simulations), Library/Media Resources/Materials & Automation software, Digital/Print Textbooks and materials, Online Professional Development & Training Resources, Learning Management Systems, Web/Video Conferencing software and equipment, and Curriculum support materials, and Assessment tools.

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

AEPA and Member Agencies prefer a single vendor with a comprehensive array of products. However, because of the unique nature of Digital Resources & Instructional Materials products, Member Agencies

may consider multiple awards, if the lowest, best-value bids come from Bidders whose business concentrates on subsets of categories, such as:

- a. Instructional/Classroom Content
- b. Library/Media Resources & Automation
- c. Digital/Print Textbooks
- d. Online Professional Development & Training Resources
- e. Learning Management Systems
- f. Web Video Conferencing

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
√		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.
		LINE ITEM: 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? Yes/No/ Undecided	Other States Member Sells In
California	Yes	AZ, NV
Colorado	Yes	
Connecticut	Yes	MA, ME, NH, NY, RI, VT
Florida	Yes	AL,GA
Georgia	Yes	
Illinois	Yes	
Indiana	Yes	
Iowa	Yes	IL, SD
Kansas	Yes	OK
Kentucky	Yes	AL, GA, LA, MS, NC, SC, TN, WV
Massachusetts	Yes	
Michigan	Yes	
Minnesota	Yes	SD
Missouri	Yes	AR, IL, LA, SD
Montana	Yes	ID
Nebraska	Yes	
New Jersey	Yes	
New Mexico	Yes	

North Dakota	Yes	
Ohio	Yes	
Oregon	Yes	
Pennsylvania	Yes	DE, HI, MD, NY
Texas	Yes	
Virginia	Yes	
Washington	Yes	AK, ID
West Virginia	Yes	
Wisconsin	Yes	
Wyoming	Yes	SD,UT
Total	28	

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

Digital Resources & Instructional Materials is a currently held category for AEPA. The resulting bid will be an Indefinite Delivery, Indefinite Quantity (IDIQ) contract(s). AEPA Member Agencies estimate approximately \$2.5 million in sales in the first contract term. 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 under this IFB. 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

AEPA will host a voluntary pre-bid conference call on Wednesday, August 14, 2019, 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-Bid Conference Call Schedule (All Categories)

IFB	Eastern	Central	Mountain	Pacific
020-A Natural and Synthetic Surfaces for Sport Fields, Tracks, Courts, Playground and Landscaping Applications	11:00 AM	10:00 AM	9:00 AM	8:00 AM
020-B Carpet & Resilient Flooring	11:30 AM	10:30 AM	9:30 AM	8:30 AM
020-C Digital Resources & Instructional Materials	12:00 PM	11:00 AM	10:00 AM	9:00 AM
020-D Facility Management Software	12:30 PM	11:30 AM	10:30 AM	9:30 AM
020-E Lawn & Groundskeeping Equipment, Supplies & Services	1:00 PM	12:00 PM	11:00 AM	10:00 AM
020-F Digital Display Solutions	1:30 PM	12:30 PM	11:30 AM	10:30 AM
020-G Vehicles – Cars, SUVs, Crossovers, Light Duty Trucks, Vans, Police and Public Safety	2:00 PM	1:00 PM	12:00 PM	11:00 AM

Join Zoom Meeting: <https://zoom.us/j/770090798>

Conference Call Number: +1 929 436 2866

Meeting ID: 770 090 798

6. Glossary of Terms and Abbreviations

Abbreviations and Acronyms for Standards and Regulations: Where abbreviations and acronyms are used in specifications or other contract documents, they shall mean the recognized name of the organizations responsible for the standards and regulations in the following list. Names, telephone numbers, and websites are subject to change and are believed to be accurate and up-to-date as of the date of the contract documents.

- a. **AEPA Member Agency:** A state cooperative purchasing agency recognized by AEPA to represent a specified state in contracting activities associated with this solicitation.
- b. **Contracting AEPA Member Agency:** An AEPA Member Agency that enters into a contract as a result of this solicitation.
- c. **Member:** A public school district or other qualifying agency authorized to use the contracts of an AEPA Member Agency.
- d. **Vendor:** Individual or entity providing goods and services to AEPA members based on the specifications of this solicitation.
- e. **Instructional Materials:** Collection of materials used in educational lessons including inanimate objects and non-human resources to promote active learning and assessment of desired learning objectives. These may include materials used in the classroom or available in a library to include textbooks, workbooks, vocabulary/spelling workbooks, study guides, supplemental reading materials such as novels or poems, visuals, graphic organizers, electronic interactives.
- f. **Library automation:** refers to the use of a computer to automate the typical procedures of libraries such as cataloging and circulation.
- g. **Z39.50:** is an international standard client-server, application layer communications protocol for searching and retrieving information from a database over a TCP/IP computer network. It is covered by ANSI/NISO standard **Z39.50**, and ISO standard 23950. The standard's maintenance agency is the Library of Congress.
- h. **SaaS:** Software as a Service is a software licensing and delivery model in which software is licensed on a subscription basis and is centrally hosted. It is sometimes referred to as "on-demand software". **SaaS** is typically accessed by users using a thin client via a web browser.
- i. **W3C:** The W3C is an international community that includes a full-time staff, industry experts, and several member organizations. These groups work together to develop standards for the World Wide Web.
- j. **LDAP:** Lightweight Directory Access Protocol is a directory service protocol that runs on a layer above the TCP/IP stack. It provides a mechanism used to connect to, search, and modify Internet directories.
- k. **SAML:** Security Assertion Markup Language is an XML-based, open-standard data format for exchanging authentication and authorization data between parties, in particular, between an identity provider and a service provider.
- l. **CAS:** The **Central Authentication Service** is a single sign-on protocol for the web. Its purpose is to permit a user to access multiple applications while providing their credentials (such as User ID and password) only once.
- m. **OAuth:** Is an open standard for authorization. It provides client applications a 'secure delegated access' to server resources on behalf of a resource owner.
- n. **MCU:** Multipoint Conferencing Unit.
- o. **E-rate:** Also known as Universal Service Funds, administered by the [Universal Service Administrative Company \(USAC\)](#) and under the direction of the Federal Communications Commission (FCC). This program provides discounts to schools and libraries for affordable telecommunications and Internet access.

- p. Asynchronous Learning: A form of education, instruction, and learning that occurs online or, utilizing online resources but not necessarily at the same time or same place for all students.

7. Special Terms and Conditions

Item	Description
7.1	The Vendor Partner will warranty all parts and materials for at least 90 days from date of purchase or manufactures' warranty, whichever is longer.
7.2	Vendor Partner will endeavor to supply products that are made in the United States of America.

8. Standard Specifications

Item	Description
8.1	The Vendor Partner will have access to a full inventory of the awarded product line.
8.2	The Vendor Partner shall maintain a minimum monthly overall average fill rate of 95% or above. Line items that are reordered, backordered, or partially filled are not considered filled line items when calculating this service level.
8.3	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.
8.4	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.
8.5	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 request.
8.6	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.
8.7	Optional services must be identified separately, and must include clear descriptions of proposed services.
8.8	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.
8.9	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.
8.10	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.
8.11	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.
8.12	Products that have a 30/60/90 day money back guarantee will be clearly identified in the catalog and on the web site (if applicable).
8.13	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.
8.14	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.
8.15	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.

Item	Description
8.16	Orders that are \$50.00 or more shall include shipping in the total price. Vendor Partner shall bid a flat rate for all orders that are less than \$50.00 regardless of where to be shipped in the continental United States.

9. Product | Category Specific Specifications

Item	Description
9.1.1	<p>Digital Learning is defined: as a digital resource and/or device that can enhance or improve the learning of all students or in support of staff.</p> <p>Instructional Materials is defined as: Collection of materials used in educational lessons including inanimate objects and non-human resources to promote active learning and assessment of desired learning objectives. These may include materials used in the classroom or available in a library to include textbooks, workbooks, vocabulary/spelling workbooks, study guides, supplemental reading materials such as novels or poems, visuals, graphic organizers, electronic interactives.</p> <p>With the following categories</p> <p>9.2.1 Instructional/Classroom Content</p> <p>9.3.1 Library/Media Resources & Automation</p> <p>9.4.1 Digital/Print Textbooks</p> <p>9.5.1 Online Professional Development & Training Resources</p> <p>9.6.1 Learning Management Systems</p> <p>9.7.1 Web Video Conferencing</p>
9.1.2	Contractor may offer a catalog in more than one category as listed in 9.2.1, 9.3.1, 9.4.1, 9.5.1, 9.6.1, and 9.7.1.
9.1.3	For cloud, based services or Web Apps vendor should provide a list of supported browsers and required plugins or extensions for service to perform properly to include versions of browsers supported.
9.1.4	For locally installed applications vendor should provide a list of Operating Systems supported by their service (i.e. Windows 10, OS 10.11, IOS 9 or greater, Android 4.0.4, etc.).
9.1.5	Pricing
9.1.5.1	Vendor can provide a District, Building, Classroom, or Student/Staff or device licensing option (Please indicate which pricing models you can offer).
9.1.6	While under contract vendor can provide to AEPA members updates to software and services at no cost or software maintenance costs must be included in final proposal.
9.1.7	Customer Service
9.1.7.1	Do you provide a 24 hour toll free customer service line and have assigned individuals to work with AEPA customers?
9.1.7.2	Can vendor provide customer support options at no additional cost to AEPA members or support costs must be included in final proposal?
9.1.8	Meets 508 accessibility and/or W3C standards and is suitable for teachers and students of all abilities.
9.1.9	When authentication is required by user Vendor can provide support for multiple authentication methods (i.e. Active Directory,, LDAP, SAML, CAS, OAuth, Local Accounts etc.)
9.1.10	Vendor has defined additional training and implementation costs not included in licensing fees of the product.
9.1.11	Vendor has provided the hosting service model (Cloud, Software as a Service SaaS, Local hosted, etc.) and associated costs for each if any.
9.1.12	Connectivity for applications – Must users always be connected to the internet to use the application or does service offer offline capabilities
9.1.13	If product/service is not a tangible item requiring shipping, such as Software as a Service or cloud based service, vendor can provide installation or access to service within 30 days of order.

Instructional/Classroom Content

Item	Description
9.2.1	Content is aligned to Core and/or State Academic Standards
9.2.2	Vendor provides content in K-12 and most curricular areas
9.2.2.1	Language Arts/English
9.2.2.2	World Languages

Item	Description
9.2.2.3	Mathematics
9.2.2.4	Science
9.2.2.5	History/Social Sciences
9.2.2.6	Art
9.2.2.7	Health & Physical Education
9.2.2.8	Career & Technical
9.2.2.9	Special Education
9.2.2.10	Alternative Education
9.2.2.11	Reading
9.2.2.12	Literacy
9.2.2.13	Music
9.2.2.14	Health/Physical Ed.
9.2.2.15	Intervention/Supplemental
9.2.2.16	AP/Honors/Electives
9.2.2.17	English Language Learner
9.2.3	If offering an Instructional catalog the vendor shall offer a broad range of products covering multiple curricular areas.
9.2.4	Examination, Testing, Assessment feature
9.2.5	Online Courseware
9.2.6	Adaptive Learning devices/software services
9.2.7	Vendor has a sufficient offering of instructional and classroom content available. Provide a total number of items that could be offered to members for this sub-category:

Library/Media Resources & Automation

Item	Description
9.3.1	eBooks
9.3.2	Multiple eBook formats are supported by vendor (ePUB, ePUB3, Mobi, KF8, iBook, PagePerfect etc).
9.3.3	Provide the number of titles that would be considered in an eBook format:
9.3.4	Educational Reference Databases or Collections
9.3.4.1	Offers a selection of standard products and services with a variety of options. Databases should offer simultaneous, unlimited access to all users. Databases linked to state and common core standards.
9.3.4.2	Offers a selection of reference books and/or materials.
9.3.5	Library Automation system should be capable in design, architecture, and performance capacity of supporting all library related applications that make use of bibliographic data, including but not limited to:
9.3.5.1	OPAC
9.3.5.2	Circulation
9.3.5.3	Library/Classroom Cataloging
9.3.5.3.1	Z39.50 Capable
9.3.5.4	Acquisitions
9.3.5.5	Serial Control System
9.3.5.6	Reporting
9.3.5.7	Online Public Catalog Access
9.3.6	Content Database Repository
9.3.7	Content Management system (Video, Audio, Document)
9.3.8	Content Subscription Services (Streaming Video, Audio, digital document formats)
9.3.8.1	Content includes Metadata
9.3.9	Textbook, Library, Asset Management
9.3.10	Ancillary items available (Library Books, Classroom Literature, Workbooks/Consumables, Reference Books, Textbooks preowned or new

Digital or Print Textbooks

Item	Description
9.4.1	Text is aligned to Common Core and/or State Standards
9.4.2	Ancillary materials are included in text licensing

Item	Description
9.4.3	Text is offered in multiple Languages
9.4.4	Digital Textbooks
9.4.4.1	Support for IOS, Android, Windows, Mac
9.4.4.2	Text books should be available in either interactive or PDF formats. The bidder shall provide a device compatibility table that clearly identifies all hand held or wireless device compatibilities. Pricing should be per student. Vendor must demonstrate how they meet the individual state's adoptive text book list.
9.4.5	Vendor has sufficient quantities of electronic textbooks available, minimum of 250. Provide the current number of titles that could be offered to members:

Online Professional Development & Training Resources

Item	Description
9.5.1	Content is aligned to Common Core and/or State Standards
9.5.2	Accredited Continuing Education Units (to include but not limited to ASCD, USDA, USDA Child Nutrition, etc)
9.5.3	Internet/Cloud hosted online content
9.5.4	Teacher Certification Services
9.5.5	Online Tutoring
9.5.6	Online Professional Development
9.5.7	Workforce Development
9.5.8	Vendor has sufficient quantities of training offerings available, minimum of 250. Provide the current number of offerings that would be available to members:

Web Video Conferencing

Item	Description
9.6.1	Hardware Codec
9.6.1.1	Codec supports Video standards: H.239, H.261, H.263, H.264
9.6.1.2	Codec supports Audio standards: G.711, G.722, G.722.1, G.728
9.6.1.3	Codec supports Network standards: H.323, SIP
9.6.1.4	Codec supports Remote Management protocols: HTTP, HTTPS, SNMP
9.6.1.5	Vendor can provide Personal Video Conferencing and Conference Room Video Conferencing units
9.6.2	Cloud Video Conferencing
9.6.2.1	HD Video, Audio, and screen sharing
9.6.2.2	Supports Desktop, Tablet, Mobile, and room systems as a connecting client
9.6.2.3	Scheduling, recording and host controls
	Support for Mac, Windows, IOS, Android and H.323/SIP room systems
9.6.2.4	Supports Group collaboration
9.6.2.5	Secure Socket Layer (SSL) encryption connections
9.6.2.6	Has Administrative reporting
9.6.2.7	View only attendee capabilities (Not requiring paid license to participate in video conference)
7.6.3	Lecture Capture capabilities
7.6.4	Able to connect a minimum of 15 participants at one time
7.6.5	MCU in the cloud capabilities

Learning Management Systems

Item	Description
9.7.1	Student Information System integration
9.7.7.1	Synchronization of roster information, assessment and grade book entries with student information systems
9.7.2	Does the vendor provide 24x7 support for teachers and system administrators? Yes _____ No _____.
9.7.3	Anytime, anywhere, any-device access – PCs, tablets, smart phones, without or with minimal plug-in requirements
9.7.4	Features that support in-school use as well as on-line and asynchronous learning uses
9.7.5	Tools for course development, teaching and learning, such as drag-and-drop content creation and management, visual page editor

Item	Description
9.7.6	Comprehensive online help pages and guides
9.7.7	Customizable notifications of activity and announcements in courses (e-mail, text, etc.)
9.7.8	Import and export of exam questions
9.7.9	Test banks (collections of questions)
9.7.10	Provides assessment and quiz system for online exams
9.7.11	Random question order and random question selection pools
9.7.12	Internal assignment drop box
9.7.13	Interoperability with other systems through IMS Global and other standards such as: Common Cartridge, Learning Tools Interoperability (LTI), Question and Test Interoperability (QTI), Sharable Content Object Reference Model (SCORM)
9.7.14	User analytics (example: track usage history by individual user)
9.7.15	Adherence to the regulations of Title II of the Americans with Disabilities Act and its amendments, as well as to the regulations of Section 504 of the Rehabilitation Act of 1973
9.7.16	Adherence to section 508 of the Rehabilitation Act.
9.7.17	Uses rich media editor to include video, audio, images, math symbols, and HTML.
9.7.18	Provides collaborative tools to allow students to work together on projects
9.7.19	Provides each school and district to custom brand the interface

10. 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.
- b. **Line-Item Pricing:** Line-item pricing is utilized when products and/or services that are broken down in detail by element, component, product categories, product type and each product and/or service is presented as an individual item which needs to be combined with other items to make up a final project or solution. The Bidder offers firm pricing for specific line items in response to this bid; a project's cost is derived by the Vendor Partner preparing and providing a quote based on the project's terms, conditions and requirements based on the line item pricing provided in the bid. The information provided in this bid for each item includes: Product Category, Product Description, Manufacturer, Manufacturer SKU, Vendor SKU, Unit of Measure, Item List Price, AEPA Bid Price.
- i. **Fixed prices:** Prices bid shall be firm until each anniversary date of contract, unless there is an occurrence of one or more economic price adjustment contingencies outlined in the bid. Fixed price offers shall include prices for any and all items.
 - ii. **Routine Price Adjustments (Without Economic Price Adjustment):** Vendors may request adjustments to the prices twice a year at the time of renewal at the AEPA Spring and Winter meetings. Vendor Partner's must submit a fully documented written request to the AEPA Category Committee Chairperson thirty (30) days prior to the AEPA meeting. The request must specifically detail and document the cause and/or reason for price changes and include any supporting documentation (manufacturer's letter, indexes, etc.). All price changes require approval by the AEPA Member Agencies.
 - iii. **Unpredictable Economic Price Adjustment:** If economic price adjustment contingencies occur, Vendor Partner may submit a fully documented request (manufacturer's letter, indexes, etc.) for price adjustment to AEPA Contract Oversight Committee for review and approval by the committee and the AEPA Member Agencies. The documentation must substantiate the cause and/or reason for the requested price increase and demonstrate that it was unpredictable at the time of bid submittal and/or contract renewal and out of the Vendor Partner's control. Pricing will take effect thirty (30) days after approval and acceptance.
 - iv. **New Products/Services:** Vendor Partner may submit new products or technologies that are within the original scope of work for the bid, to be added to the contract pending review and approval of the AEPA Bid Oversight Committee and AEPA Membership. Requests should be submitted to the AEPA Contract Oversight Committee thirty (30) days prior to the AEPA Winter or Spring meeting.
- c. **Automated System for Pricing (ASP):** The method consisting of an ASP and/or software application (RSMMeans, Gordian) that is self-contained and consists of a turn-key solution that includes a complete line-item listing of all of the products, supplies, materials, equipment, services, accessories and options with their description, specifications, terms, conditions and associated pricing for each item, sub-assemblies and/or assemblies. The Bidder provides a percent of discount or fixed multiplier/factor to be applied to total project cost to allow for individual state conditions and requirements and to arrive at the AEPA price.
- d. **Alternative Method of Costing:** This method covers any product and/or service not covered by catalog pricing, published price list, line-item price list, automated system for pricing, or is a product and/or service due to the projects or applications specifications, conditions and /or

requirements that need to be custom designed, developed, manufactured and/or produced to meet the requirements of an individual, project or sole source. The alternative pricing is calculated as follows:

- i. The Bidder must prepare, issue and receive three written quotes from available suppliers and select the supplier that offers the products and services that meet the stipulated requirements and specifications and the most cost effective solution. All quotes must be made available upon request.
- ii. The Bidder must indicate the percent of overhead and /or markup as part of their response to be added to these costs to obtain the normal and customary retail price.
- iii. The AEPA price is calculated by taking the product and services to cost to the Contractor plus the indicated percent of profit/overhead to equal the normal and customary retail price. The Contractor will then subtract the approved AEPA discount to obtain the AEPA price. Example: item cost \$1,000; percent of profit/overhead of 20% equals retail price of \$1,200; less the AEPA discount of 10% or \$120 equals the AEPA price of \$1,080.

2. Secondary Pricing Methods (Catalog Bids only, see Part B for category designation): Bidders are required 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 required 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. **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 is not exceeded after the time limit. The AEPA Oversight 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.
- 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. This bid category does not have a Core Item List.
- b. 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 Discount (Required)
 - ii. F.2 – Non Core Price Schedule (Required)
 - iii. F.3 – Services Price Schedule (Optional)
 - iv. F.4 – Volume Discounts
- c. The Catalog Category Discount and the Core Items award will not be split.
- d. 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 other considerations, 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.

11. 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. 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:

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