



## REQUEST FOR PROPOSALS

### SOLICITATION MANAGER

Solicitation offers will be received by the Association of Educational Purchasing Agencies (AEPA) until:

**September 15, 2023, 4:00 PM CT**

The Association of Educational Purchasing Agencies (AEPA) is a multi-state non-profit organization made up of Educational Service Agencies /political subdivisions organized through a Memorandum of Understanding between all participating states. We are a true “cooperative” who serves to leverage combined purchasing power to benefit all schools and agencies across the United States, regardless of size, with the ability to purchase at equal buying levels.

AEPA started in 2000 with 10 member states with purchasing professionals who had the mutual goal of securing combined volume purchasing contracts based on potential sales by qualifying customers in participating states using:

- Combined expertise
- Existing vendor relationships
- Experience & overall vision

Today, AEPA consists of 29 member states who jointly publish competitive solicitations nationally that are tailored to meet each state’s specific legal requirements. Awarded contracts are available statewide and facilitated by one cooperative member agency acting as the contract administrator. Member states assist with any questions regarding the contract and provide supporting documentation needed for eligible entities within their state to purchase using the awarded contracts.

The AEPA Board consisting of all member states meets bi-annually to determine the needs of the group and what commodities should be solicited. Each commodity group consists of a team of three or four individuals to develop the scope for their respective solicitation. With that said, although there is a vast amount of procurement expertise within the group, a solicitation manager is needed to oversee the entire process of each solicitation cycle.

AEPA is seeking a qualified individual(s) to manage the AEPA solicitation process, start to finish, for the association. AEPA currently issues solicitations twice per year. There are approximately eight (8) solicitation categories every August to be awarded in December. Additionally, three to four (3-4) mid-year solicitations may be published as needed and when specific parameters are met. The mid-year solicitations are awarded in April. Currently there are twenty-eight (28) bid categories awarded with sixty (60) Vendor Partners.



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The scope of services for the Solicitation Manager include:

- Coordinate with the AEPA Solicitation Coordinator and Solicitation Committee, Officers, Executive Committee, Category Committee Chair and Category Committee, Vendor Partners and Potential Vendor Partners, AEPA Solicitation Specifications Developer and others as needed to carry out the prescribed services.
- Support the mission, vision, and goals of AEPA.
- Complete other services as requested by the AEPA Executive Director and AEPA President, under this scope of work.
- Have an extensive knowledge of AEPA solicitation processes.
- Develop, distribute, and ensure adherence to a detailed timeline for each solicitation cycle.
- Review current solicitation specifications for categories that are on cycle for re-solicitation.
- Conduct conference calls with Category Committees to obtain updates on category specific research and progress.
- Research/write/edit/update Vendor Questionnaire.
- Create/maintain standard evaluation forms.
- Request information from states and maintain Part C State Ts and Cs.
- Create and distribute solicitation advertisement templates to states.
- Collect all completed advertising Affidavits from each state.
- Distribute survey for member states to indicate participation and insert the results into the specifications of each respective solicitation.
- Upload and configure solicitations online.
- Publish the solicitations.
- Provide all necessary information to the AEPA website to post current solicitation opportunities and instructions for vendors to access solicitation documents.
- Set up and host the non-required vendor calls published in the bid documents for each category.
- Monitor the online site during the solicitation process.
- Work with the Executive Director and category committees to call potential respondents during all solicitations.
- Work with Committees on any needed addendums to solicitation documents, write and post addendums.
- Host the solicitation response opening and tabulate the responses.
- Publish the tabulation, notify respondents of the results, notify the AEPA members and post to the website as directed by the Administrative Solicitation Committee chair.
- Send each Solicitation Category Committee all Responsible and Responsive responses for their review.
- Notify in writing all recommended respondents as well as the Meeting Planning Committee chair.



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- Notify in writing all non-recommended respondents with reasons for non-recommendation.
- Upload to the AEPA website the notification report, tabulation, recommendation forms and supporting documents.
- Continually monitor and evaluate the solicitation process and recommend revisions to the Administrative Solicitations Committee.
- Maintain constant and consistent communication with the category committee chairs.
- As directed by the Administrative Solicitation Committee, create solicitation guidance documents.
- Work with the Solicitations Committee to maintain a current template of the solicitation documents.
- Continuously monitor, edit and update solicitation evaluation documents.
- Contract Extensions
  - Assist the appropriate committees in evaluating the contract extension process.
  - Manage the Contract Feedback Survey process for the AEPA Categories.
    - Create the survey.
    - Distribute the survey.
    - Send the survey responses to the Category Committee chairs.
  - Send the renewal form to the Category Committee chairs for completion.
  - After contract extension(s) are approved by the AEPA board, develop and distribute Extension Agreements to all members for adoption and signature.

AEPA estimates the successful firm/individual will invest up to 500 hours annually in performance of the services described herein.

Interested firm(s) or individuals shall submit the following with the stated timeline;

- Company information including years in business
- Number of individuals proposed to provide services, including names and qualifications of each individual (resumes)
- Other clients that you provided the same type of services to
- Proposed annual fee for requested services

### **Term of Agreement:**

A one (1) year agreement will commence on January 1, 2024 with an option to renew annually each January 1.

### **Proposal Submission via Email to:**

George Wilson, AEPA Executive Director

[georgewilson.aepa@outlook.com](mailto:georgewilson.aepa@outlook.com)

### **Proposal Deadline:**

**September 15, 2023, 4:00 PM CT**



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### AEPA MEMBER AGENCY INFORMATION

State	Agency Name	State	Agency Name
California	Monterey County Office of Education d/b/a CalSAVE	Nebraska	ESU Coordinating Council (ESUCC)
Colorado	Colorado BOCES Association	New Jersey	Educational Services Commission of New Jersey
Connecticut	Capitol Region Education Council (CREC)	New Mexico	Cooperative Educational Services
Florida	Panhandle Area Education Consortium	North Dakota	North Dakota Educators Service Cooperative
Georgia	Cooperative Purchasing Agency	Ohio	Ohio Council of Educational Purchasing Consortia
Illinois	Illinois Learning Technology Purchase Program	Oregon	Intermountain ESD
Indiana	Wilson Education Center	Pennsylvania	Central Susquehanna Intermediate Unit d/b/a Keystone Purchasing Network
Iowa	AEA Purchasing	South Carolina	Carolinas Alliance 4 Innovation (CA4I) dba Carolina Buy
Kansas	The Purchasing Cooperative at Greenbush	Texas	Region 16 Education Service Center d/b/a TexBuy
Kentucky	Green River Regional Educational Cooperative	Virginia	Fairfax County Public Schools
Massachusetts	The Education Cooperative	Washington	King County Directors' Association
Michigan	Oakland Schools	West Virginia	Mountain State Educational Services Cooperative
Minnesota	Cooperative Purchasing Connection	Wisconsin	CESA Purchasing
Missouri	EducationPlus	Wyoming	Northeast Wyoming BOCES
Montana	Montana Cooperative Service		



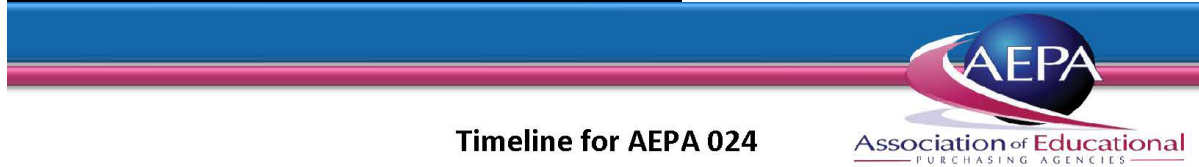
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### CURRENT AWARDED CATEGORIES

Athletic Equipment and Supplies	HVAC & Mechanical Products and Solutions
Athletic Lighting	Institutional Kitchen Equipment
Athletic Surfaces	Lawn & Groundskeeping Equipment
Career and Technical Education	LED Lighting
Custodial Supplies	Maintenance, Repair & Operations
Digital Copiers	Mobile & Cellular Connectivity Solutions
Digital Display Solutions	Office Supplies
Digital Resources	Playground & Recreational Equipment
Disaster Recovery Services	Roofing
E-Rate Consulting Service	School and Instructional Supplies
Facility Management Software	Security Solutions
Furniture	Technology Buyback
Hardwood & Synthetic Flooring	Technology Catalog
Health & Wellness	Vehicles

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### EXAMPLE SOLICITATION TIMELINE



#### Timeline for AEPA 024

Task	Action By:	Date(s)
Approval of 024 Categories	AEPA Board	Winter Meeting
Review, change and finalize Bid 024 templates	Solicitations Comm	December 6, 2022 – April 24, 2023
Begin review of the category <ul style="list-style-type: none"> <li>Scope of work, specifications, pricing, researching potential respondents, etc.</li> </ul>	Category Comm	December 6, 2022
Conference calls with Category Committees <ul style="list-style-type: none"> <li>Overview of 024 by Solicitations Committee</li> <li>Category Comm provides update on category specific research, potential vendors, and how the solicitation will be structured</li> </ul>	Solicitations Comm   Category Comm   Bid Mgr.	February 21-22, 2023
Present overview of category structure and outreach	Category Comm	AEPA Spring Meeting
Final templates for Parts B, D, & F sent to Category Comm	Solicitations Comm	May 2, 2023
Request updated Member State Ts & Cs	Bid Mgr.	May 2, 2023
Member State Ts & Cs Due	Member States	May 11, 2023
Participation Survey for 024 opens	Bid Mgr.	May 2, 2023
Participation Survey Due	Member States	May 11, 2023
Conference calls with Category Committees. <ul style="list-style-type: none"> <li>Review final draft of documents</li> </ul>	Solicitations Comm   Bid Mgr.   Category Comm	June 7-8, 2023
Category Comm submits Parts B, D & F to Bid Mgr.	Category Comm	June 22, 2023
Review and approve Parts B, D & F from Category Comm	Solicitations Comm	June 23 - July 14, 2023
Legal Notice sent to member states	Bid Mgr.	July 10, 2023
Solicitation documents (Parts A, B, C, D, & F) reviewed/approved/finalized for posting	Bid Mgr.   Solicitations Comm	July 18 - July 29, 2023
Release 024 via Public Purchase	Bid Mgr.	August 2, 2023
Non-required vendor conference call for each category	Solicitations Comm   Category Comm   Bid Mgr.	August 17, 2023
Question deadline	Solicitations Comm   Category Comm	August 28, 2023
Addendum Deadline	Solicitations Comm   Category Comm	August 31, 2023
Submit legal affidavits to Bid Mgr.	Member States	September 1, 2023
Solicitation Opening – conducted electronically	Solicitations Comm   Category Comm   Bid Mgr.	September 12, 2023 Closes at 1:30 p.m. ET Opens at 2:00 p.m. ET
Qualified responses available to Category Comm for evaluation	Bid Mgr.	September 13, 2023 end of day
Notify qualified and non-qualified vendors	Bid Mgr.	By September 19, 2023
Conference calls with Category Committees. <ul style="list-style-type: none"> <li>Discussion on status of evaluation process and potential award recommendations</li> </ul>	Solicitations Comm   Category Comm   Bid Mgr.	September 28, 2023
Send award recommendation to Bid Mgr.	Category Comm	By October 6, 2023
Review of award recommendations	Solicitations Comm	October 9 – 20, 2023
024 documents, responses, notification reports available for posting	Bid Mgr.	By October 23, 2023
Notify recommended Vendors; send invite to Winter 2023 meeting. Notify non-recommended Vendors	Bid Mgr.	October 23, 2023
Recommendation of Awards	AEPA Board	Winter Meeting