

**Request for Information (RFI)**  
**Request for Proposal (RFP)**  
to supply  
eSourcing and Contract Management as a service to  
the  
Association of Educational Purchasing Agencies  
(AEPA)

# eSOURCING CONTRACT MANAGEMENT SERVICE

Request for Information (RFI) will be received by the Association of Educational Purchasing Agencies (AEPA) until: **October 16, 2023, 4:00 PM CT**

Proposals will be accepted by invite after qualifications have been verified by committee for identified AEPA needs and functionality of service: **November 08, 2023, 4:00 PM CT**

AEPA reserves the right to reject any or all offers in whole or in part; to waive any formalities or irregularities in any offers, and to accept the offers, which in its discretion, within state law, are for the best interest of AEPA.

## Timeline

09/25/2023	Release of the RFI/RFP
10/16/2023	Questionnaire Responses and additional information Due to AEPA – 4:00 pm CT
10/23-31/2023	Scheduled Vendor demonstrations and Q/A sessions
11/08/2023	Final Pricing Proposals & Agreement Due - 4:00 pm CT
11/28/2023	Contract Recommendation to Board
01/04/2024	Begin Implementation/Testing for 025 solicitations
03/01/2024	Service Ready for 025 Solicitation testing

## Introduction and Purpose

The Association of Educational Purchasing Agencies (AEPA) is requesting information from companies capable of providing an eSourcing service to manage and streamline our entire solicitation process. We seek to evaluate the capabilities and offerings of suppliers with which AEPA will ultimately enter into an agreement for a robust managed Software-as-a-Service (SaaS) that supports and complies with policies, guidelines and processes relevant to procurement including soliciting, evaluating, awarding, processing, executing and overseeing contracts, and contract compliance.

## About AEPA

AEPA is a nonprofit organization composed of Educational Service Agencies, nonprofit or governmental agencies in twenty-nine states organized for the purpose of providing cooperatively solicited contracts for goods and services for the use by schools and other public agencies in member states. AEPA is governed by officers and an Executive Director elected by a Board composed of representatives from each member state. We have joined together with the following goals:

- Leverage the purchasing power to benefit all regardless of size, with the ability to purchase at equal buying levels
- Combine the potential needs of all to create an incentive to vendors to offer the best price and the highest quality product in the country.
- Streamline the solicitation and purchasing process through a single national solicitation and state locally awarded contract tailored to meet each state's specific legal requirements.
- Provide a single contract that is available statewide with one cooperative agency identified in each state to function as the statewide contract facilitator and representative.
- Become the national purchasing option for interested qualified customers and vendors.

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 solicitation category consists of a team of three or four individuals to develop the scope and specifications 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 has been conducting solicitations on behalf of public agencies since 2000. We currently have 70 vendor contracts in 28 different categories. AEPA runs two open solicitation cycles a year that include 4-10 categories each cycle. The solicitations are awarded in November and April. Our most recent solicitation had 8 categories and closed with 59 responses. We currently use the service, Public Purchase, as our solicitation platform, but find we have additional needs not available through Public Purchase.

AEPA contracts with a solicitation manager whose primary function is to oversee the logistics of the solicitation process. The solicitation manager will be the primary administrative user of the eSourcing and Contract Management service. However, multiple AEPA members will need to have varying roles within the site during the solicitation process.

## 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		

## 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

## 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.	Bid Mgr.	October 23, 2023
Notify non-recommended Vendors		
Recommendation of Awards	AEPA Board	Winter Meeting

## **Description of General and Specific Requirements**

### **Primary Functions**

The SaaS service should provide the following primary functions with specific features for each.

- Vendor Management
- Solicitation Management (IFB, RFP, RFQ, RFI, Others)
- Solicitation Evaluation
- Award Management
- Contract Management
- Vendor Performance & Contract Evaluation

These are minimum functions. AEPA desires information on vendor capabilities to meet or exceed these functions and invites information on additional capabilities that may include sales submission and reporting by members or vendors.

### **Vendor Management**

- Vendor registration and management of vendor data. Required or Non-Required fields should be customizable by AEPA
- Vendor data collection requirements
- Vendor communications

### **Solicitation Management**

- Hosting of documents and/or specifications for multiple solicitations
- Vendor invitation messaging
- Solicitation duplication
- Solicitation templates
- Solicitation language libraries
- Question management, including question time period management and response management
- Custom question/response functionality
- Addenda management
- Custom forms
- Response tabulation
- Required document management during response (e.g., Bid bond, Tax documents, Questionnaire)
- Collect completed advertising Affidavits by member states

### **Award Management**

- Notifications for Responsive or Nonresponsive submissions

### **Contract Management**

- Vendor contact information
- Electronic signatures
- Tracking and notification of contract acceptance

- Tracking of awarded and non-awarded contracts by state
- Notification of contract expiration
- Custom forms (Sales, Paid Administrative Fees, etc.)
- Archiving or expiration of contracts

## **Vendor Performance and Contract Evaluation**

- Analytical Reporting
  - Sales Reporting
  - Administration Fee Reporting
  - Vendor Performance Survey to State Agencies
  - Aggregated State Agency Reports
  - Historical Year-Over-Year Data Reports
  - Custom Reports

## ***Requirements***

The service must provide a user experience that is simple, direct, effective and reliable. It should allow for multiple types of users with different rights and levels of access for AEPA management, State agency members, Committee and Vendor access into the system, including registration of vendor bid bonds and tax documents and reporting/analysis.

### User Accounts and Administration

The Service will provide a variety of user account types from full access for system administrators to a tiered structure of limited access depending on the user's role. It is anticipated that AEPA will coordinate and develop the user account structure with the Service Provider during the initial stages of implementation. For some processes, an approval hierarchy of assigned users (or alternate approvers should an approver not be available) would need to be included. Administration of the Service, including User setup/maintenance, should have delegation control to allow AEPA options to distribute the administration responsibilities. Delegation capabilities should allow definition of the specific functions that the delegated Administrator will have access to manage. Administrator accounts should have the ability to send notifications to all or select user groups within the authority granted to them.

### Audit Trail and History

The service will be required to track all user and Vendor activity throughout the service and run related reports on any activity. As an example, all solicitation submissions must be time stamped and list all submitted documents. The Service should also track the history of steps throughout the service that tracks date, time, user, when and who approved (if applicable), status changes, approval or rejection history, etc. History can either be obtained by running a report, opening a history tab or other defined options. Queries run during normal business hours should not have any adverse effect on service performance or user access at any time. All data and documents must be retained in the service. Versioning of documents, catalogs, profile history, etc. should be available.

### Solicitation Process

The service should accommodate multiple types of solicitations, simple to complex, from catalog to construction solicitations to RFPs for services, line-item solicitations and other customized solicitations. The service should allow for multiple solicitations or RFPs to be run simultaneously. It should also accommodate vendor registration, vendor access reports, input of solicitations, tracking of solicitations from previous years, and trending tools that provide information on multiple segments of the solicitation process. AEPA would like to use custom forms and have a library of forms for use. The service should be capable of inviting vendors and host unique logins for user groups, vendors, or admins. Other key functionalities include public posting, notification to/communication with vendors, evaluation tools for solicitations/proposals, Addenda management, solicitation protest management, Question & Answer management, and award notification.

### Awards

The service should include a tool that will allow us to compare, contrast, and analyze solicitation responses. There should be contingencies for “tie” solicitations. The service should not make automatic awards, but rather, allow for AEPA to thoroughly evaluate all solicitations. The service should also contain a history of awards so documents may be produced showing the analytical processes used to determine the winning solicitations and reasons for disqualifications. The service should include the ability to archive old solicitations and create documents to provide transparency for the process.

### Contract Management

The Contract Management components of the Service encompass all aspects of contract development, tracking and administration. Key contract administration functions include management of subcontractors, identification of authorized resellers (dealers, distributors, etc.), and may include vendor sales reports, vendor performance as well as amendments and renewals.

### Vendor/Contract Performance

The AEPA organization currently utilizes a contracted open-source solution (Customer Relationship Management (CRM)) database for data collection dealing with vendor contracts, sales history and administrative fees. The current CRM has met our needs but is very dependent on the developer to import data collected through a website form, creation of new reports, importing of data, and report creation. AEPA has identified a need for these same functions to collect Sales Reports, Administrative Fees, Survey State Members, and Report generation be available in a self-service method rather than being so dependent on a developer to provide these services. This type of service could be a value-add option to your proposal but would not necessarily be a requirement.

## ***Non-functional Requirements***

### Hosting

The service must be hosted in a data center. The hosting provider must provide for back-up, data retention, and disaster recovery models and plans as needed for the service. Any hosting provider will abide by ITIL best practices for change requests, incident management, problem management and service help desk.

### Service Assistance

The vendor must provide a Help Desk operation in support of the service. AEPA is looking for process expertise, assistance and guidance for service walkthroughs or specific transactional assistance to quickly resolve issues where users are unable to utilize the service as designed and implemented. The vendor will provide the user with instructions and tools to quickly troubleshoot, diagnose, and resolve the issue, respond and resolve incoming, reported and assigned issues and service requests. The help functions will use an appropriate, up-to-date, and fully-featured automated call-answering, chat, or related system for communication. The vendor will provide a logging system to record all issues and service requests received including, at a minimum, name, organization, and issue.

### Application

The vendor must provide for application management and design standards of all technology platforms and environments for the application service related to performance, incident reporting and maintenance. AEPA will own any data they enter, migrate, or transmit into the service and the vendor shall allow AEPA to export or copy this data at any time free of charge. In the event of breach or cancellation of the contract, the vendor will provide at no additional cost to AEPA a backup of the AEPA data in a usable format.

### Security

Cyber security is of utmost importance to AEPA. Vendors must have documented and implemented security practices for the following and have a process to audit/monitor for adherence.

- SSL Certificates
- Input validation
- Output encoding
- Authentication and password management with multi factor authentication capabilities
- Session management Access control
- Cryptographic practices
- Error handling and logging
- Data protection from unauthorized use, modification, disclosure or destruction (accidental or intentional).
- Backup-Restore Plan
- Communication security
- System configuration
- Data security
- File management
- Memory management
- Fraud detection
- General coding practices
- Risk Assessment Practices including but not limited to vulnerability assessment and pen testing
- Incident response planning and testing
- System Security Plan delivery

## ***Qualifications***

To be considered qualified, AEPA anticipates the respondent will have the following:

- Meets AEPA unique feature needs
- Multiple years of demonstrated success
- Financial stability
- References
- Reputation for reliability and customer satisfaction

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

- Company information including years in business
- Other clients that you provided the same type of services to
- Proposed annual fee for requested services and agreement by November 08, 2023 4:00 pm CT

## **Term of Agreement:**

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

## ***How to Respond***

Please use the attached questionnaire to provide a detailed description of your service. While this RFI is focused on the above listed functions, AEPA is interested in further functionalities that may provide additional benefit. As part of the RFI process, respondents must provide approximate pricing, specific services proposed, support, and time necessary to make the service available.

Top respondents will be asked to provide a demonstration of their service and participate in a question-and-answer session. The AEPA committee evaluating service can provide sample solicitation documents from previous solicitations on request if you want to mock up a demonstration with actual documents utilized by AEPA. Requests may be sent to [georgewilson.aepa@outlook.com](mailto:georgewilson.aepa@outlook.com), CC: [info@aepacoop.org](mailto:info@aepacoop.org).

Please provide at least three references from current clients having a similar scope and needs as those sought by AEPA. Please include contact information for each reference (name, title, email, and telephone number).

Should you require clarifications or assistance completing our form, please contact Craig Peterson [craig.peterson@esucc.org](mailto:craig.peterson@esucc.org).

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

George Wilson, AEPA Executive Director

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CC: [info@aepacoop.org](mailto:info@aepacoop.org)