



# **NEW VENDOR MANUAL**



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## **Welcome**

We are pleased to welcome you as a new vendor for the Association of Educational Purchasing Agencies (AEPA). Our goal is to support the success of each of our vendor partners. Use this manual as a place to start with understanding who we are, how we operate, and where to go for more information. Effective communication is the cornerstone of what we consider a strong and successful partnership. Please reach out if you have questions or need assistance.

### **I. About AEPA**

The Association of Educational Purchasing Agencies (AEPA) is a school procurement consortium established in 2000 through a Memorandum of Understanding and incorporated in 2007 under the state laws of Nevada. Currently, twenty-nine (29) states have joined to issue simultaneous Invitations for Bids (IFB) and Requests for Proposals (RFP).

AEPA's mission is to cooperatively serve our members through a continuous effort to explore and solve present and future purchasing needs. AEPA reaches thousands of educational and nonprofit organizations across the nation. While primary members are e-12 schools, many of our agencies also serve higher education, local government, and nonprofit organizations, greatly extending our reach with awarded purchasing contracts.

AEPA goals include working to secure multi-state volume purchasing contracts with benefits that are measurable, cost-effective, and continuously exceed member expectations. AEPA is committed to accomplishing this mission lawfully and ethically, using leading edge technology and futuristic business practices. In addition to value, volume pricing is of great importance to members. AEPA requests that potential respondents only reply if they are able to offer prices lower than they would offer on separate, single school district contracts, and with prices lower than they would offer on a single state contract or multi-state contracts that have a lesser volume. AEPA designates one public agency, the Member Agency, per state that operates legally under the rules and regulations of that state. Any additional agencies that wish to participate will negotiate with the authorized Member Agency and participate through them in a manner in which they mutually agree is not in conflict with AEPA procedures. The Member Agency will be the only agency allowed to represent that

state in AEPA and will be the only communication link between AEPA and that state.

AEPA operates through various committees which interact to perform administrative and solicitation functions. Each committee has a chairperson and is made up of a diverse group of AEPA board members from multiple states.

All of this results in what sets us apart – AEPA contracts are “nationally bid, locally awarded.”

## **II. How to Become an AEPA Vendor**

AEPA solicitations are published two times per year in July and January and are valid for a four-year period. Vendors need to register on the AEPA’s solicitation online portal, Public Purchase ([www.publicpurchase.com](http://www.publicpurchase.com)) to access the solicitation documents. Instructions for registering with AEPA on Public Purchase are on the AEPA website.

Once the solicitation is closed, the responses deemed complete are sent to the category committee for evaluation. The solicitation responses are subject to a rigorous review process in order to select the best vendors to serve our members. The category committee presents the evaluations and recommendations for award to the full AEPA Board.

Once a contract is recommended by AEPA, it is then up to each state to award a contract. Once the lead agency within said state signs the contract, only then is there a properly awarded and valid contract within that state through AEPA. This contract is renewed annually for a maximum of four years. The category is usually re-solicited after the fourth year. This is also discussed in section VI.A. below.

Once becoming an awarded AEPA vendor it is important to read and understand the bylaws of AEPA. See Section III to find out how to access the bylaws.

## **III. Web Access**

The AEPA website can be found at [www.aepacoop.org](http://www.aepacoop.org). There you will find all of the supporting documentation that is needed – bylaws,

procedures, past meeting and solicitation documents, as well as current committee, vendor and member contact lists.

There is a Vendor Only Login section of the website which requires a username and password. This information is provided to all new AEPA vendors.

#### **IV. New Vendor Support**

New vendor support is a team effort. New vendors should feel free to call upon any member of the AEPA team for advice and support. Each solicitation has a category committee that recommends vendors and supports the vendor throughout the solicitation period. The category committee chairperson should be the primary point of contact. Other veteran vendor partners can also be contacted for support. The category committee chairs, committee member lists and a current list of vendors with contact information are posted on the AEPA website.

#### **V. Vendor Obligations**

Each vendor is selected based on their commitment to supporting the AEPA contract they were awarded. Vendors are required to demonstrate sales in multiple states and must show evidence of support and marketing efforts in the form of increasing sales.

##### **A. Expectations**

As an approved AEPA Vendor Partner, the following are expectations for partnership. They are based on the actions of our most successful Vendor Partners and designed to help create a solid foundation for success:

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 of the contract and must have working knowledge of the contract.
2. Train and educate sales staff on what the AEPA cooperative contract entails 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.

The 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 Agency and the Vendor Partner's local sales representatives to market within each State.
5. Quarterly, complete the sales and administrative fee report and submit to each Member Agency along with the respective administrative fees to be paid. If there are no sales, a zero-dollar (\$0.00) report is required. See Section VII. A. below.
6. Report sales and administrative fees by participating state if requested by AEPA.
7. Have ongoing communication with the category committee chairperson, AEPA Member Agencies and the Member Agencies participating entities.
8. Attend the Annual Meeting and the Winter Meeting. See B. Meeting Info below.
9. Support local and national trade shows. Participate in national and local conference trade shows to promote AEPA contracts such as, 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.

## **B. Meeting Information**

The entire AEPA Board (one to two representatives from each Member Agency) meets two times per year. The spring meeting takes place in April and is held at different locations. Time is scheduled for members to meet with each vendor during the vendor roundtable session. The purpose is to discuss marketing strategies and any issues specific to that member state. Vendors must register and pay registration fees by the initial deadline in order to be included in the roundtable schedule.

The winter meeting typically takes place in November/December and is adjacent to the Association of Educational Service Agencies



(AESAs) Annual Conference. At this meeting, the category committees report on the solicitation results and the Board votes on the recommended vendors for each new solicitation. The Board also votes on awarded contract extensions.

Vendors are required to have a representative attend both meetings. Early registration is encouraged.

## **VI. Solicitation Process**

The Member States Agencies form the Board of AEPA. The Board meets each spring for the purpose of, among other items of business, selecting product categories to seek solicitation responses from national vendors. A vote is taken based on the potential success of a contract in each of the states.

Category committees are assigned to each solicitation to develop product specifications, to market to and to educate potential vendors, and to refine terms and conditions specific to product categories.

Member Agencies are expected to submit state-specific terms and conditions, as well as sales projections, for solicited items. Members may elect or decline to participate in a solicitation category. A table of participating states is located in each category solicitation document.

In the fall each member posts the solicitation announcements in their state. This allows the solicitations to adhere to the advertising requirements in each state. This is especially important because the member states, not AEPA, award the contracts.

The solicitations are issued in July and January and are due back in approximately 30 days (exact dates fluctuate a bit from year to year).

Vendors must register on AEPA's solicitation online portal in order to access the solicitation documents. Vendors must also familiarize themselves with the terms and conditions of AEPA as well as each individual Member Agency and must abide by any state and/or local regulations within the member states.

When responses are returned, the category committees review the submissions and make recommendations to the Board for approval at the next meeting. Each member state then enters into a contractual agreement with each vendor for each category which the agency has

elected to participate. Each state is requested to maintain a minimum of 50% of the total AEPA contracts available.

#### **A. New Contract Award Process**

Awarded vendors are required to send a signed Acceptance of Bid and Contract Award form to each member state along with the entire solicitation package. The member state returns the fully signed contract to the vendor. Vendors should collaborate with each member to develop a marketing strategy within their state.

#### **B. Extension Process**

In addition to signing new contracts, existing contracts in favorable terms are extended annually for a maximum of three years. Members extend signed Contract Extension forms to each vendor they wish to extend. Vendors must return a signed copy back to the member.

\*A current list of new and active contracts can be found on the AEPA website.

### **VII. Reporting Requirements**

#### **A. Administrative Fees**

Vendors are required to submit quarterly reports to each member using a standard form to maintain consistency in reporting. Zero dollar sales (\$0.00) reports must also be submitted. Along with the reports, vendors will send quarterly payments in accordance with the administrative fee each member has set, which is typically around 2%. All administrative fees will be paid by the vendor to the member within thirty (30) days after the quarter end and within forty-five (45) days after the calendar year end. Each state's administrative fee is located in a table in the solicitation documents.

\*The Quarterly Report Template can be found at the AEPA Vendor Administrative Information section of the website under Reporting.

### **VIII. How Do Customers Order from AEPA Contracts**

Member Agencies can select to have orders processed through their organization, although many do not. Ordering information can be

found in the State Terms and Conditions that are included in the solicitation documents. Member Agencies can provide their customers with the documentation they need but primarily customers will work directly with the vendors to get pricing information and place orders. Several AEPA states now use EqualLevel, an on-line ordering process.

## **IX. Appendices**

### **A. Officers List**

The current AEPA officers are:

Executive Director	George Wilson
President	Tina Smith, KS
Vice President	Joni Puffett, IA
Secretary	Anna Marie Hollander, MI
Treasurer	Robin Strauser, NM

The following can all be found at [www.aepacoop.org](http://www.aepacoop.org). To access, hover your mouse over the Home icon in the top left-hand corner of the public view.

### **B. Vendor List**

A current vendor list can be found on the website. If there is more than one contact listed for a vendor, the primary contact will be indicated by an asterisk.

### **C. Member List**

A current member list can be found on the website. If there is more than one contact listed for a member state, the primary contact will be indicated by an asterisk.

### **D. Administrative and Category Committee Lists**

A current list of administrative and category committees can be found on the website. Members of each committee are listed by name and state. Committee chairs are noted and are the primary contract for the committee and the vendor partner.

### **E. Governing Documents**

These include the Articles of Incorporation, Bylaws, Board Policies, Procedures, Memo of Understanding, and Member Application. Current governing documents can be found on the website.

## **F. Communication**

There are two Google Groups distribution lists for easy communication by sending an e-mail to the appropriate list:

- [aepa-members@aepacoop.org](mailto:aepa-members@aepacoop.org)
- [aepa-vendors@aepacoop.org](mailto:aepa-vendors@aepacoop.org)

If you are not receiving AEPA communications, please contact Michelle Selak, [michelle.selak@oakland.k12.us](mailto:michelle.selak@oakland.k12.us) to be added to the list.