



INVITATION FOR BID NUMBER AEPA IFB #007-B

GENERAL OFFICE SUPPLIES AND RELATED SERVICES

PART C – BID FORMS

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Bid Submittal Organization and Check List

1. Bid Submission instructions are found in Section E of Part A of the bid documents.
2. The Part C Bid Forms shall be submitted in both printed and electronic copy. Bidders shall include an exact paper copy of the electronic submission, paper copy(ies) of items that cannot be made a part of the electronic submission, and the electronic forms in the sealed bid package. In case of discrepancies, the printed responses will prevail over electronic submissions.
3. In order to insure that every bid receives a fair evaluation and comparison, it is required that each bid be organized in the following manner. A three-ring binder with an inside pocket and a set of dividers is required.
4. It is suggested that the bidder preparing a response check off each required item as it is completed. The same list will be used by AEPA evaluators to ascertain that the bid is complete.
5. Any submittals too large to secure in the binder must be clearly labeled with the name of the bidder.
6. One original copy of the bid shall be submitted.
7. All documents with signatures shall have original ink signatures.
8. Electronic data must be provided on CD. Electronic media shall be clearly identified and labeled by including the vendor name, name of the bid and date. Electronic media must be placed in a protective pouch. Electronic price lists shall be in Microsoft Excel 2003 or less and shall allow for sorting on any of the fields listed below. Other documents may be submitted as Word or PDF files.

Divider	Form	Description	Signature Required	Hard Copy	Word or PDF File	Excel File
1	A	_____ Bid Affidavit Signature Page (Notarized Hard Copy)	X	X	X	
1	B	_____ Acceptance of Bid and Contract Award	X	X		
2	C	_____ Questionnaire for Bidders	X	X	X	
2	D	_____ Company Information	X	X	X	
3	E	_____ Exceptions to Terms, Conditions and Specifications	X	X	X	
4	F	_____ Category Questionnaire	X	X	X	
4		_____ Substantiating Documentation		X	X	
5	G	_____ Discount & Price Schedule (This will be a printout of the electronic pricing.)	X	X		X
6		_____ Market Basket file for bid evaluation		X		X
7		_____ Appendix with Catalogs, Slicks, Model Information, etc.		X		
Left Pocket		_____ Bid Security Bond for \$25,000		X		
Left Pocket		_____ Electronic Media				

_____ Check or initial here after all questions have been answered and data provided as requested. (Omissions and errors may cause bid to be rejected.)

A. BID AFFIDAVIT SIGNATURE PAGE

AFFIDAVIT

1. The undersigned, duly authorized to represent the persons, firms and corporations joining and participating in the submission of the foregoing bid (such persons, firms and corporations hereinafter being referred to as the bidder), being duly sworn, on his/her oath, states that to the best of his/her belief and knowledge no person, firm or corporation, nor any person duly representing the same joining and participating in the submission of the foregoing bid, has directly or indirectly entered into any agreement or arrangement with any other bidders, or with any official of the **Member Agency**, or any employee thereof, or any person, firm or corporation under contract with the **Member Agency** whereby the bidder, in order to induce the acceptance of the foregoing bid by the **Member Agency**, has paid or is to pay to any other bidder or to any of the aforementioned persons anything of value whatever, and that the bidder has not, directly nor indirectly entered into any arrangement or agreement with any other bidder or bidders which tends to or does lessen or destroy free competition in the letting of the contract sought for by the foregoing bid.
2. This is to certify that the bidder, or any person on his/her behalf, has not agreed, connived, or colluded to produce a deceptive show of competition in the manner of the bidding or award of the referenced contract.
3. This is to certify that neither I, nor to the best of my knowledge, information and belief, the bidder, nor any officer, director, partner, member or associate of the bidder, nor any of its employees directly involved in obtaining contracts with the State of **Member Agency**, **Member Agency**, or any subdivision of the state has been convicted of false pretenses, attempted false pretenses, or conspiracy to commit false pretenses, bribery, attempted bribery or conspiracy to bribe under the laws of any state or federal government for acts or omissions after January 1, 1985.
4. This is to certify that the bidder or any person on his behalf has examined and understands the terms, conditions, scope of work and specifications, and other documents of this solicitation and that any and all exceptions have been noted in writing and have been included with the bid submittal.
5. This is to certify that if awarded a contract, the bidder will provide the equipment, commodities, and/or services to members and affiliate members of the Agency in accordance with the terms, conditions, scope of work and specifications and other documents of this solicitation in the following pages of this bid.
6. This is to certify that we have completed, reviewed, approved and have included all information that is required in Sections C, D, E, F and G of these bid forms.

Authorized Representative (Please print or type)

Mailing Address

Title (Please print or type)

City, State, Zip

Signature of Authorized Representative

Date Phone Fax

Subscribed and sworn to before me this _____ day of _____

Notary Public in and for County of, State of _____

My commission expires: Signature: _____

B. ACCEPTANCE OF BID AND CONTRACT AWARD

AEPA IFB 007-B – GENERAL OFFICE SUPPLIES AND RELATED SERVICES

**ACCEPTANCE OF BID
and
CONTRACT AWARD**

TO BE COMPLETED BY BIDDER

In compliance with the Invitation to Bid, the undersigned warrants that I/we have examined the Instructions to Bidders, and, being familiar with all of the conditions surrounding the proposed projects, hereby offer and agree to furnish all labor, materials, and supplies incurred in compliance with all terms, conditions, specifications and amendments in the INVITATION TO BID and any written exceptions to the bid. Signature also certifies understanding and compliance with the certification requirements of the Agency Terms and Conditions and the special Terms and Conditions. The undersigned understands that his/her competence and responsibility and that of his proposed subcontractors, time of completion, as well as other factors of interest to the 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 _____

ACCEPTANCE OF BID AND CONTRACT AWARD TO BE COMPLETED ONLY BY AGENCY

Your bid for contracting services is hereby accepted. As contractor, you are now bound to sell the materials and services listed by the attached bid based upon the solicitation, including all terms, conditions, specifications, amendments as set forth in the Invitation for Bid. As contractor you are hereby cautioned not to commence any billable work or provide any material or service under this contract until contractor receives an executed purchase order from the Agency. The parties intend this contract to constitute the final and complete agreement between the Agency and contractor, 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 it shall be 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 term of the agreement shall commence on award and continue until February 28, 2008 unless terminated, canceled or extended. By mutual written agreement, the contract may be extended for three additional 12-month periods ending on February 28, 2009, February 29, 2010 and February 28, 2011.

Awarding Agency: _____

Agency Executive _____

Awarded this _____ day of _____

Contract Number _____

C. QUESTIONNAIRE FOR BIDDERS

Company Name _____

Please check Yes/No answers. "Days" requested are calendar days. If room provided is inadequate indicate, "see attached" and label the attachment with the question number.

- 1. Can your company serve all AEPA states with the best service offered? **YES** **NO**
- 2. Do you currently have representatives for all AEPA states? **YES** **NO**
- 3. (If no, a plan and timeline for providing these services is to be attached.)
- 4. Is your pricing guaranteed for the term of the contract? **YES** **NO**
- 5. For products on your price list, is shipping/handling included in the price? **YES** **NO**
If No, estimate S/H on purchases (% of purchase price, UPS, etc.) _____
- 6. Describe your return policy. What is your restock fee, if any? (Restock fee must not exceed 15%)

Describe any exclusions or limitations applicable to your return policy. _____

- 7. Will you offer Member Agencies a quick pay discount? **YES** **NO**
- 8. If YES, what is the discount (indicate %/number of days)? _____
- 9. How many line items are you offering under this bid category? _____
- 10. If some of the line items that you sell are not covered under this bid, do you have a way to block orders for those items? **YES** **NO**
- 11. Delivery of stocked items is promised within _____ **days**
- 12. What is your average time from receipt of order to shipping stocked items? _____ **days**
- 13. Delivery of non-stocked items is promised within _____ **days**
- 14. Do you offer an electronic ordering system? **YES** **NO**
- 15. Do you have minimum order requirements? **YES** **NO**
If yes, please describe. _____

16. Indicate the level of support you are offering in this bid. **A bid will be determined nonresponsive if this question is unanswered.**

Prices offered in this bid are:

- ____ a. The same as we offer on single school district bids.
- ____ b. The same as we offer to cooperatives and state purchasing departments.
- ____ c. Better than we offer to cooperatives or state purchasing departments.

If line b or c is checked, indicate the percent lower (on single items) than the best price offered to educational institutions, cooperatives, or state purchasing departments.

- ____ Two percent (2%) ____ Three percent (3%) ____ Four percent (4%)
- ____ Five percent (5%) ____ Six percent (6%) ____ Other _____

17. Additional quantity or volume discounts are identified on the pricing page **YES** **NO**

D. COMPANY INFORMATION

Note: This is a sample form. Actual data must be provided on disk, and printed. Original must be signed and inserted in the bid after it is printed.

Proper evaluation of bidders requires information about their companies.

- 1a. Public Companies must provide their most recent yearly report to stockholders.
- 1b. *Private Companies must answer the questions below.*
 - a. Provide a brief history of your company that includes the type of business and its philosophy of doing business. If the bidder has recently purchased an established business, or has proof of prior success in this business, or a closely related business, please provide written verification.
 - b. Indicate the location of the headquarters of the company. List any branch offices in the state of any AEPA member. Provide the name, title, qualifications and experience of the employee, that will coordinate the work and be the general contact for this contract.
 - c. For purposes of determining a bidder's ability to perform financially, attach a letter from your financial institution that indicates the line of credit available to you currently, and evidence of financial stability over the past three (3) years. This letter does not need to identify a dollar amount; instead, a credit range should be indicated. (For example, "credit in the low six figures" or "a credit line exceeding five figures").
2. Gaps sometimes exist between management (those who respond to IFB's) and sales staff (those who contact the public educational institutions) that result in problems. Provide the Names your key sales people, phone numbers and states for which they are responsible.

F. CATEGORY QUESTIONNAIRE

Describe your company’s ability to meet the following general specifications. Bidders will respond to each numbered item by checking the appropriate “Comply” or “Deviate” box. “No Bid” items shall be marked as such in the appropriate “Deviate” box. Details for deviations will be listed by item number on the Exceptions to Terms, Conditions and Specifications Form above.

	Requirement	Comply	Deviate
5.1	Vendor shall provide a broad based line of office products of at least 10,000 items in available inventory.		
5.2	All products shall be new and of high quality. Products that are re-filled or re-manufactured will be labeled as such.		
5.3	The vendor’s catalog shall include a variety of major manufacturers of the specified products and services. Office supplies shall comprise at least 80% of catalog products.		
5.4	The catalog shall contain a minimum of 10,000 items.		
5.5	Private label products may be offered. Any change of manufacturers of a private label during the term of the contract will result in offerings equal to or superior to the originally approved manufacturer at a price equal to or lower than the original offering.		
5.6	Vendor shall have an electronic on-line catalog, including shopping cart capabilities, for order entry use by the members. Features include: product lookup that shows <u>contract</u> price; ability to set purchasing authorization limits; ability to download order and invoice history reports.		
5.7	Orders of stocked products will be shipped within 48 hours of receipt of order. The participating entity shall be notified by the vendor if the product ordered cannot be shipped within this time period to give the member the opportunity to secure product elsewhere.		
5.8	Contractor will maintain a minimum monthly average fill rate of 95%. Line items that are reordered, backordered, or partially filled are not considered filled line items when calculating this service level.		
5.9	No “restocking” fees may be collected on items cancelled for failure to be delivered within the specified time frame.		
5.10	Products sold under the contract must be guaranteed by the contractor for a minimum of one year. With the exception of clearly identified special order items, all merchandise sold under the contract shall be subject to exchange or refund.		
5.11	The minimum dollar value of an order delivered to a single location shall be no more than \$50.00, unless a different amount is required by a member agency.		
5.12	Orders not filled and partials shall be indicated o the packing list. Vendor shall inform member of anticipated delivery date for unfilled and partial orders.		
5.13	All deliveries shall be accompanied by delivery tickets or packing slips. Tickets shall contain the member’s purchase order number, vendor name and name of article. Cartons shall be identified by purchase order number and vendor name.		
5.14	General office supplies shall include, but not be limited to, pencils, pens, markers, and other writing instruments; correction fluid, tape, film and other correction products; tape, glue, paste and other adhesives; staplers, staples, paper clips, and paper clamps; permanent and removable self-adhesive, moisten and stick, colored and clear, and specialty labels; standard file folders, hanging file		

	folders, floor and desktop file cabinets, trays, containers, and organization systems.			
5.15	Calculators shall include, but not be limited to electronic handheld, desktop and scientific printing and non-printing calculators.			
5.16	Paper products shall include, but not be limited to white and color copy and duplicator paper; linen office papers; envelopes; index cards; writing pads; composition books; loose-leaf paper; card and cover stock; and other paper supplies.			
5.17	Miscellaneous equipment shall include, but not be limited to paper shredders, electric and mechanical pencil sharpeners, clocks, radios, wastebaskets, and labeling equipment.			
5.18	Specialty equipment and supplies shall include, but not be limited to signs, nameplates, name badges, computer carrying cases, briefcases, and housekeeping supplies.			

6.0 Substantiating Documentation

6.1	Indicate the number of years the company has been in business.
6.2	Provide resumes and information on key personnel, including the contract manager.
6.3	Provide a list of 5 public agencies who are current clients. For each client, provide a contact person and contact information.
6.4	What size is your inventory? Where is it located?
6.5	How many items are currently in your catalog?
6.6	What is your current average monthly fill rate for catalog items?
6.7	What is your current delivery time for stocked items?
6.8	Describe the capabilities and functionality of your on-line catalog/ordering web-site. Also describe your "Punchout" capabilities with e-commerce and financial software. List all software that provide "Punchout" integrations with your catalog. List references and contact information.
6.9	Describe how you propose to market the program to members. Provide samples of marketing efforts that have worked effectively in the past.
6.10	Do you have outside salespeople in any or all of the AEPA states? If yes, how will you involve the outside salespeople in marketing the AEPA contract?
6.11	Describe your customer service system. How many employees do you have in customer service? Do you have on-line support?
6.12	Describe other related services (e.g. printing services, etc) you may have available.

G. DISCOUNT & PRICE SCHEDULE

Bidder shall provide a price and discount schedule. Bidders may prepare their own schedules. However, all price schedules shall follow the format and provide the information listed below. Additional pricing and/or discounts may be included.

Electronic price lists (must be submitted on a CD) must clearly be identified/labeled by including the vendor name, name of the bid and date. These must be placed in a protective pouch. All pricing data must be clearly dated for audit purposes. Electronic price lists shall be in Microsoft Excel 2003 or later and shall allow for sorting fields in the fields below:

- Manufacturer
- Manufacturer Part Number
- Vendor Part Number (if different)
- Product Description
- Dated List Price
- Percentage discount from List Price
- Final Agency Price

Pricing must be in the form of discount(s) off catalog prices. Pricing must be taken from the most current catalog distributed to schools. Discounts may be offered using any of the following methods:

- A. Standard discount off of the entire catalog,
- B. Discounts that vary by category:
 - 1. General Office Supplies
 - 2. Calculators
 - 3. Paper Products
 - 4. Laminating Materials & Equipment
 - 5. Miscellaneous Equipment
 - 6. Specialty Equipment

Any shipping charges or additional fees must be clearly identified.

Additional Discounts: If additional discounts are given based on dollar volume, size of order, or other criteria, state your formula for arriving at these discounts:

In addition, the following market basket pricing based on September 15, 2006, MSRP must be completed:

AEPA Office Supplies Bid 2006-Market Basket Items

Description	Pack	MSRP as of 9/15/06	Price	Comments*
Clips/Pins/Rubber Bands				
Paper Clip #1 Std. Size 100/Bx	BX			
Binder Clip, 3/4" Black 12/Bx	BX			
#4 Brass Fastener, 1" 100/Bx	BX			
Thumb Tacks, #2 3/8" 100/Bx	BX			
Push Pins, Clear 100/Bx	BX			
Safety Pins, Asstd. Sizes 22/Bunch	EA			
Butterfly Clips, 2-1/2" 12/Bx	BX			
Magnetic Clip, 2" 12/Bx	BX			
Rubber Bands, Asstd. 1/4 lb.	BG			
Post-It Notes				
Post-it Notepad, 1-1/2"X2 Yellow 12/Pk	PK			
Index Cards				
Index Card, 3X5 Ruled White 100/Pk	PK			
Plastic File Box for 3X5 cards	EA			
A-Z Guides, 3X5 25/Pk	PK			
Portfolios/Binders				
View Ring Binder 1", Black	EA			
Vinyl Ring Binder 1-1/2", Black	EA			
Sheet Protector Top Load 100/Bx	BX			
HvyDuty Portfolio, 2Pocket Asst w/fastener 25/Bx	BX			
Portfolio, 8 Pocket White	EA			
3-Fastener Report Covers, 25 Asstd.	BX			
5-Tab Index, Asstd. Color Tabs	ST			
8-Tab Index, Clear Tabs	ST			
Filing Supplies				
Hanging Folders, 1/5 Cut 25/Bx	BX			
Hanging Folders, 1/3 Cut 25/Bx	BX			
A-Z Guides, 1/5 Cut	ST			
Legal Folders, 1/3 Cut 100/Bx	BX			
White Labels, 1/3 Cut 248/Bx	BX			
Envelopes				
6X9" With Clasp 100/Bx	BX			
9X12" With Clasp 100/Bx	BX			
9-1/2"X12 With Clasp 100/Bx	BX			
Correction Supplies				
Multipurpose Correction Fluid	EA			
Multipurpose Correction Fluid	DZ			
Correction Tape, 1-Line	EA			
Liquid Paper Correction Fluid, White	EA			
Liquid Paper Smooth Coverage	EA			

Bic White-Out, Super Smooth	EA		
Calendars			
14 month Desk Pad	EA		
14 month Refill	EA		
12 month Desk Pad	EA		
12 month Refill	EA		
National School Calendar (Std)	EA		
Office Paper			
Copy Paper, 8-1/2"X11" White	RM		
Copy Paper, 8-1/2"X14" White	RM		
Copy Paper, 8-1/2"X11" Blue	RM		
Copy Paper, 8-1/2"X11" Yellow	RM		
Pads and Fillers			
Legal Pads, 8-1/2"X14" Yellow	DZ		
Legal Pads, 8-1/2"X11-3/4" White	DZ		
Steno Notebook, 80pg White	EA		
Filler, 8-1/2"X11", 3/8" Rule, 3-Hole	RM		
Roller, Plastic, & Porous Tip Pens			
Original Uni-ball Fine Pt, Black	DZ		
Original Uni-ball Fine Pt, Red	DZ		
Uni-ball Vision, Fine Pt., Blue	EA		
Liquid Espresso, Extra Fine Black	EA		
Flair Pen, Blue	DZ		
Pen Felt Pt, Black	DZ		
Pen Felt Pt, Red	DZ		
Ball Point Pens			
Bic Round Stick, Med.,Black	DZ		
Papermate Stick, Med., Red	DZ		
Bic Stick Grip, Med., Black	DZ		
Specialty Pens & Highlighters			
Sharpie Fine Pt Marker, Black	DZ		
Sharpie Fine Pt., 4-Color Set	ST		
Sharpie Fine Pt., 8-Color Set	ST		
Sharpie Extra Fine, Blue	DZ		
Sharpie Ultra Fine, Black	DZ		
Vis-A-Vis Fine Pt., Black	DZ		
Vis-A-Vis Fine Pt., Red	DZ		
Sharpie Accent Highlighter, Yellow	DZ		
Sharpie Accent Highlighter, Fluorecent Yellow	DZ		
Sharpie Accent Tank, 6-Color Set	ST		
Bic Brite Liner, 5-Color Set	ST		
Dry Erase Products			
Expo Cleaner, 8-oz spray bottle	EA		
Expo Dry Eraser	EA		
Expo Low-Odor, Bullet, 4/set	ST		
Expo Marker w/Eraser, Chisel, 4/set	ST		
Dixon Marker, Broad, 4-Color Set	ST		
Sharpeners/Punches			
Boston KS Sharpener, Chrome	EA		
Boston 1900 Electric Sharpener	EA		
3-hole Punch	EA		
Staplers/Staples			

Swingline 747 Full Strip, Black	EA		
Boston Electronic Stapler, Putty	EA		
Swingline Speedpoint Std Staples	BX		
Staple Remover	EA		
<i>Tape, Dispensers, Adhesives, & Hanging Devices</i>			
Magic Tape w/Dispenser 3/4"X300"	RL		
Tape Dispenser, Black	EA		
Rubber Cement, 4 oz	EA		
Rubber Cement, Quart	EA		
Glue Stick, .28 oz	EA		
Plasti-Tak Adhesive, 2.48oz/Pkg	PK		
<i>Miscellaneous Office & Desk Accessories</i>			
Kleenex Facial Tissue, 2Ply 100/Bx	BX		
Facial Tissue, 2-Ply, 100/Bx	BX		
Clipboard, Letter Size	EA		
Clipboard, Legal Size	EA		
Clear Contact Paper 18"X24' Roll	RL		
Calculator, hand held solar	EA		

(End of Part C)