

MOMENTUM VENTURES, LLC  
ON BEHALF OF  
PARTICIPATING CHARTER SUPPORT  
ORGANIZATIONS AND THEIR  
AFFILIATED  
PUBLIC CHARTER SCHOOLS

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REQUEST FOR PROPOSAL  
MV-MRO-001

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*For*  
Maintenance, Repair and Operations  
Goods and Services

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*Primary Contact:  
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## ***Introduction***

Momentum Ventures, LLC (“MV”), acting as a group purchasing agent on behalf of participating charter school support organizations (“Participating CSOs”) and their Affiliates (“Buyers”) is soliciting proposals from qualified Vendors to enter into a master group purchasing agreement for MRO Goods and Services (“Products”). See below for the complete list of Participating CSOs.

MV is acting as a group purchasing agent only and the awarded vendors(s) will deal directly with individual Buyers. Each Buyer will be solely responsible for its own purchases, orders, and conduct under this Agreement. *Buyer participation in the agreement is voluntary.*

## ***Definitions***

All capitalized terms in this RFP not defined in this Section shall have the meanings set forth in the Sections or Exhibits of this Agreement in which they are defined.

Throughout this RFP there are terms which are synonymous and interchangeable, such as “Vendor” or “Supplier” and “Contractor,” “Proposer” and “Bidder,” “Proposal” and “Bid,” and “Agreement” or “Master Agreement” and “Contract.”

Participating CSO: A charter school service organization/association or charter school purchasing organization that executes a participation addendum to the attached Agreement.

Buyer or Buyers: MV, MV Affiliates and Participating CSOs and their Affiliates.

Affiliates: Each legal entity identified by MV or Participating CSOs that is a past, present or prospective Affiliate. Affiliates are most typically public charter schools with membership in the Participating CSO.

## ***About Momentum Ventures, LLC***

### ***Mission***

Our mission is to reduce costs associated with providing a quality public education and provide resources and tools to inspire and maintain innovation and financial sustainability throughout the nation’s charter school community.

### ***About Charter Schools***

Charter schools are free public schools of choice that have the ability to deliver tailored educational programs to meet the specific needs of the communities they serve. Their unique operational autonomy typically enables them to make supply-chain purchasing decisions based on their needs and priorities. As such, charter schools represent a unique market segment for product and service vendors that wish to expand their public K-12 market share. According to the [\*National Alliance for Public Charter Schools\*](#), in the 2013-2014 school year there were 6,440 charter school serving over 2.5 Million students in 42 states. Charter schools are a rapidly growing segment of the K-12 public education market—in 2013 over 600 new schools opened their doors.

## *A Strategic Partnership*

MV and Participating CSOs will work with the awarded vendor to create visibility and buy-in of the vendor's products and services. MV views the agreement as a strategic partnership that will create mutual benefit for all parties—Affiliates, the Vendor, Participating CSOs and MV.

MV and the Participating CSOs will work alongside the awarded Vendor to craft and implement a customized contract implementation and management plan. MV will leverage its extensive experience and relationships across the national charter school market to create opportunities for market penetration and growth. At a minimum, each Participating CSO will provide the following benefits to awarded vendor:

- The awarded vendor shall be promoted more prominently and preferentially than any other competitor vendor in the same product category/ies that does not have a group purchasing agreement with the CSO.
- Distribute co-branded award announcements, including announcements via print, email website, and in any other applicable publications to Affiliates.
- Provide space on the Participating CSO's website that highlights the awarded vendor's products and services and the awarded vendor's status as a group purchasing partner.
- Provide access to information on affiliates in order to allow Vendor to efficiently and effectively segment and target Charter School Buyers. This information may include membership lists, lists of new schools, lists of schools opening new campuses, etc.
- Where practical, provide access to Affiliate buyers and top decision-makers. Access may include "warm" email or phone introductions, joint visits to affiliates with Vendor, inclusion in meetings or events hosted by the Participating CSO, etc.
- Provide opportunities for sponsorship, advertising and exhibit tables at Participating CSO events.
- Provide opportunities to publish and/or present educational material to Participating CSO Affiliates.
- Conduct business review meetings with Vendor on an as-needed basis.

## *Participating CSOs and their Affiliate Buyers*

MV is releasing this RFP on behalf of the following Participating CSOs and their Affiliates:

<b>Participating CSOs and Charter Support Organizations</b>	<b>Number of Affiliate Charter Schools</b>	<b>Number of Students</b>
California Charter Schools Association	1,234	519,000

Colorado League of Charter Schools	211	99,328
DC Association of Chartered Public Schools	64	36,823
Delaware Charter Schools Network	21	10,370
Georgia Charter Schools Association	120	69,392
Idaho Charter School Network	51	19,409
Maryland Charter Schools Networks	55	21,397
Massachusetts Charter Public School Association	87	35,353
Michigan Association of Public School Academies	330	141,204
Minnesota Association of Charter Schools	156	44,100
Missouri Charter Public School Association	40	19,439
New Jersey Charter Schools Association	93	31,743
New Mexico Coalition for Charter Schools	98	21,911
North Carolina Public Charter Schools Association	149	58,933
Ohio Association of Public Charter Schools	445	119,533
Pennsylvania Coalition for Public Charter Schools	182	130,842
Public Charter School Alliance of South Carolina	66	22,384
Tennessee Charter Schools Center	96	15,533
Texas Charter School Association	635	200,000
Utah Association of Public Charter Schools	102	54,906

Wyoming Association of Public Charter Schools	4	382
Washington State Charter Schools Association	1	100
<b>TOTALS</b>	<b>4,240</b>	<b>1,672,082</b>

*Note that numbers of Affiliates and students are approximate and subject to change*

# REQUEST FOR PROPOSAL

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## 1. GENERAL INSTRUCTIONS

**1.1.** Although a proposal response format has been provided, it is not intended to limit Vendor's innovative response to this RFP. Innovative ideas, new concepts, and alternative partnership arrangements falling outside the specifications of this RFP may be considered. For example, these might include unique business features, special services, discounts or terms and conditions unique to each Vendor. MV may accept an offer under this RFP that demonstrates such a significant change or improvement that it considers being a breakthrough advancement to the products, services or equipment being sought. Such proposals may be considered as providing added value/incentive.

**1.2.** The purpose of this RFP is to identify vendors who offer the best value in each of the product categories listed. Proposers do NOT need to respond to each product section, and may submit a proposal for one or more sections. The purpose of this is to ensure that we are selecting the best possible partner for each category regardless of the breadth of their total catalog.

**1.3.** RFP Timeline (Momentum reserves the right to alter any dates as needed)

1.3.1. RFP Release Date	November 17, 2014
1.3.2. Question and Answer Period	Nov. 17 – Dec. 5, 2014
1.3.3. Proposal Submission	December 5, 2014
1.3.4. Proposal Review and Analysis	Dec. 8 – 19, 2014
1.3.5. Vendor Presentations	Week of January 5, 2015
1.3.6. Vendor Selection	Week of January 12, 2015

## **1.4.** Questions and Clarification

1.4.1. Any questions regarding this RFP must be directed via email to Robin Walker at [rwalker@momentum-v.com](mailto:rwalker@momentum-v.com) or through the use of the Q&A section of this RFP.

1.4.2. All questions must be received no later than the deadline for submission of the RFP.

1.4.3. Vendors are expected to raise any questions, exceptions or concerns they have regarding the RFP. If Vendor discovers any significant ambiguity, error, conflict, discrepancy, omission or other deficiency in this RFP, the Vendor should immediately notify Robin Walker via email of the deficiency and request modification or clarification of the RFP document.

1.4.4. Any questions and responses specific to the terms and conditions, process, procedures, language, specifications and other parts of the RFP may be made public in the "Q&A" section of this RFP. Questions and responses that pertain to proprietary information will be answered confidentially via email.

## 2. RFP OBJECTIVES

*The following outlines the primary objectives of this RFP:*

- 2.1. Provide Buyers with MRO Goods and Services at cost effective pricing that recognizes the aggregate purchasing volume of all participant Buyers.
- 2.2. Establish the best overall value and lowest total cost of ownership available to participating Affiliates.
- 2.3. Reduce Participating CSO, Buyer and Vendor administrative costs through a central bid process that reduces or eliminates the need for multiple bids and responses.

## 3. DEFINITION OF PRODUCTS

### 3.1. Maintenance, Repair, Operating Supplies (MRO) and Related Services

**(Installation, Repair and Renovation):** A complete and comprehensive offering of MRO products and services available from the vendor including\*

- 3.1.1. Appliances, building materials, hardware, HVAC, janitorial, landscaping equipment and supplies, motors, pumps, paints and coatings, plumbing, chemicals, hand-held general purpose tools, power tools, window coverings and other miscellaneous MRO supplies offered by the vendor.
- 3.1.2. Complete range of services through the vendor such as, but not limited to, installation, renovation services, repair services, training services and any other related services offer by the vendor.

*\*NOTE: The purpose of this RFP is to identify vendors who offer the best value in each of the product categories listed. **Respondents do NOT need to respond to each product section**, and may submit a proposal for one or more sections. For instance, a company may respond to the janitorial supply section alone. The purpose of this is to ensure that we are selecting the best possible partner for each category regardless of the breadth of their total catalog.*

## 4. MARKET OPPORTUNITY

- 4.1. MV anticipates significant Affiliate purchases to be recorded against the resulting Agreement(s). At the time of release 22 Participating CSOs representing 4,240 eligible charter schools have agreed to participate in the agreement pending the satisfactory outcome of this RFP. This represents approximately 66% of the total national charter school market. MV expects a substantial opportunity for growth (in terms of Affiliate purchases) with competitively awarded Agreement(s) in these markets.

## 5. MOMENTUM VENTURES ADMINISTRATIVE FEES

MV and Participating CSOs will work closely the awarded vendor to develop strategies to encourage contract sales growth and market penetration. The Administrative Fee paid to MV (as calculated in the attached Agreement) will be shared with Participating CSOs as per the terms of the Participation Addendum Agreement (see Attachment A). **The administrative fee is not a variable part of this award or part of the evaluation criteria-** if MV decides to alter the fee, all proposers will be notified of the new fee calculation and it will become part of the final agreement with the awarded vendor.

## **6. MINIMUM QUALIFICATIONS**

Each Proposer must meet the following minimum qualifications to participate in this proposal:

- Is able to provide sales and service to Buyers nationwide.
- Can demonstrate the ability to both market and service their services/products nationwide.
- A demonstrated commitment to the K-12 market. Proposers must have at least three (3) years' experience selling the Products to the K-12 market within the last five (5) years.
- Is able to offer a wide array of products and services at prices lower than what they would ordinarily offer to a larger school district or regional cooperative bid.

## **7. OPTION TO REJECT PROPOSALS**

MV may, in its sole and absolute discretion, reject any or all proposals submitted in response to this RFP. MV shall not be liable for any costs incurred by the Proposer in connection with the preparation and submission of any proposal.

## **8. BASIS OF AWARD AND AWARD RULES**

**8.1.** Proposals will be evaluated by MV in accordance with our contracting process rules.

An evaluation committee of Participating CSO executives will be called upon to assist in proposal evaluation and to validate the award decision. Finalists will be asked to make oral presentations to MV and the committee and/or further clarify their written proposals.

MV and Participating CSOs have identified the following criteria as most critical to the award decision:

- Pricing and terms that provide for increased discounts and lower overall total cost
- Added value/incentives and services
- Breadth and quality of products/services
- Ability to effectively market and promote the products/services to all eligible Affiliate buyers
- Experience in and an understanding of the charter school market
- Service, support, product warranty and maintenance
- Order placement/delivery/installation



- Vendor’s qualifications, references, experience and past performance
- e-Procurement capabilities, including electronic ordering, e-commerce, procurement cards, billing and access to Vendor’s electronic catalogs

**8.2.** MV expects all proposals to reflect the Proposer’s best value and does not plan to negotiate further with the Proposers. However, MV reserves the right to negotiate further with the Proposers.

**8.3.** By submission of proposals pursuant to this RFP, Vendors acknowledge that they are amenable to the inclusion in a contract of any information provided either in response to this RFP or subsequently during the selection process.

**8.4.** A proposal in response to an RFP is an offer to contract with MV and Participating CSOs based upon the terms, conditions, and scope of work and specifications contained in the RFP and attached Group Purchasing Agreement.

**8.5. Evaluation criteria**

MV will use an overall scoring system with a total possible score of 215 points. MV reserves the right to assign any number of point awards or penalties it considers warranted.

<b>Criteria</b>	<b>RFP Requirements Section</b>	<b>Points (out of 215)</b>
General Company Information	9	5
Experience	10	30
Ordering and Distribution	11	20
Sales and Marketing	12	35
Partnership Strength	13	15
Products and Pricing	14	45
Service	15	30
Contract Terms and Conditions Fit	16	15
Presentation and overall quality of proposal (fit)	N/A	20

# REQUEST FOR PROPOSAL – REQUIREMENTS

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## **SUBMISSION FORMAT**

Provide answers to the following questions in MS Word or similar format. Number your answers so that each numbered section below has a corresponding answer. We suggest you use subsequent numbered questions as a form, with your answers written in below each question. Each question that reflects value to members (pricing, marketing, references, etc.) will be given a corresponding score when we evaluate the proposals. Blank answers will be given a score of zero, so please explain why you cannot answer the question instead of leaving a question blank.

***SUBMISSIONS THAT DO NOT FOLLOW THIS FORMAT WILL BE CONSIDERED INCOMPLETE.***

## **9. GENERAL COMPANY INFORMATION**

- 9.1. Company name
- 9.2. Company address
- 9.3. Company website address
- 9.4. Stock symbol (if publicly traded) and exchange
- 9.5. Primary contact name and title, phone number, email address, and fax number
- 9.6. Brief description of your company including date of incorporation and geographic range (national, international, etc.)
- 9.7. Number of years you have been selling the products under consideration to the K-12 market
- 9.8. Indicate your approximate national K-12 market share
- 9.9. Provide your company's total annual revenue for 2012 and 2013
- 9.10. Please indicate if you currently have other group purchasing agreements in place. If so, please list those pertinent to the K-12 public education market and include the contract term.
- 9.11. Are you a woman-owned or minority business?

## **10. EXPERIENCE: EXISTING CHARTER SCHOOL BUSINESS AND REFERENCES**

- 10.1. Attach a list (in MS Excel) of all public charter school customers from the last 12 months in all Participating CSO states: CA, CO, DC, DE, GA, ID, MA, MD, MI, MN, MO, NC, NJ, NM, OH, PA, SC, TN, TX, UT, WA, WY.
- 10.2. Provide a report in Excel showing the existing sales dollar volume from the last 12 months for the products and services under consideration with current public charter school customers in all Participating CSO states: CA, CO, DC, DE, GA, ID, MA, MD, MI, MN, MO, NC, NJ, NM, OH, PA, SC, TN, TX, UT, WA, WY.

**10.3.** Provide 2-3 references from any of the Participating CSOs or from charter schools. If none exist, provide references from public K-12 customers. For each reference, please include the following information:

- Participating CSO or School Name
- Contact Name and title
- Address
- Phone numbers
- Dates serviced

## **11. ORDERING AND DISTRIBUTION**

**11.1.** Internet/E-Commerce Site: describe your firm's capabilities and functionality of your on-line catalog/ordering website. Please indicate if the website can and will include the following features; contract specific products and prices, technical specifications, implementation of a hosted or punch out e-catalog on a variety of platforms, quoting capability, online ordering, shipment, tracking and payment.

**11.2.** Momentum's e-procurement platform:

Momentum Ventures licenses an e-procurement catalog marketplace from ePS (<http://www.eprosvcs.com/>). The awarded Vendor is expected to work with MV and ePS to create or link (hosted or punch-out) a catalog of the products available to Buyers at the contract pricing. See attachment for more information on the ePS supplier program.

11.2.1. To comply with ePS and Momentum's e-procurement platform, all Suppliers must agree to perform the following activities, where applicable:

11.2.1.1. Sign a technology contract with ePS. Nominal fees **may** apply (based on transaction volume and other factors): \$1500 one-time set up fee, \$150 monthly subscription fee and 1% transaction fee. Develop a hosted or punch-out e-catalog with ePS. The catalog is for all the bid and (if approved) non-bid items.

11.2.1.2. If using a hosted catalog, it must be delivered on an ePS approved template.

11.2.1.3. If using a hosted catalog, it must contain images for every line item.

11.2.1.4. Supplier will take responsibility for managing the catalog after launch using ePS Catalog Manager.

11.2.1.5. Obtain a merchant account with Fifth Third Bank or Global Payments if the customer is paying via credit card.

11.2.1.6. Participate in ePS onboarding process which includes responding to test emails and attending training on both ePS Fulfill and ePS Catalog Manager.

11.2.1.7. Submit all invoices through ePS Fulfill; no paper invoices outside the system will be accepted.

11.2.2. Optional Functionality (Cost-Based Add-Ons Billed to Supplier):

11.2.2.1. Punch out catalog versus hosted catalog

11.2.2.2. Integration from ePS Fulfill to the supplier's Point of Sales or back-office software

- 11.3.** Describe how your company proposes to nationally distribute Products outlined in this RFP through your distribution system.
- 11.4.** Identify all other companies that will be involved in processing, handling or shipping the Product to the end user.
- 11.5.** State your products delivery time and any options and associated costs for expedited delivery, desktop delivery, optional freight and returns.
- 11.6.** If applicable, describe your company's electronic customer services platform (web-based or otherwise) and any associated options and costs.
- 11.7.** Describe your backorder policy.

## **12. SALES AND MARKETING**

- 12.1.** MV is seeking the ability to serve all current and potential Participating CSOs and their Affiliates nationwide. The Proposer must demonstrate the ability to both market and service their services/products nationwide. Please acknowledge that your sales and service force contains sufficient people in sufficient proximities, to receive the knowledge, opportunity, and reward in order to make a personal commitment to serving Participating CSOs and their Affiliates.
- 12.2.** The Proposer must exhibit the willingness and ability to develop marketing materials and activities. For each of the following sections please acknowledge and agree that you will be able to perform the activities as described.
  - 12.2.1. Printed Marketing Materials. Proposer agrees to initially produce and thereafter maintain full color print advertisements in electronic format including company logos, identifying the Vendor, the Vendor's general utility for charter school Affiliates, and contact information to be used by MV, Participating CSOs and Affiliates in a full page, half page, and quarter page formats. These advertisements will be used in the MV and Participating CSO catalogs and publications.
  - 12.2.2. Advertisements. Proposer agrees that they will work with MV and Participating CSOs on a marketing plan identifying their anticipated contract announcements, advertisements in Participating CSO periodicals, or other direct or indirect marketing activities.
  - 12.2.3. Proposer's Website. Proposer will identify how an Awarded Contract will be displayed on the Proposer's website. An on-line shopping experience for Affiliates is desired when applicable and will be viewed as a value-added attribute to a Proposer's response.

12.2.4. Trade Shows. Proposer will outline their proposed involvement in the promotion of a Contract resulting from RFP through trade shows. Vendors are encouraged to identify tradeshow, and other appropriate venues, for the promotion of any such Contract. Vendors are strongly encouraged to participate in cooperation with MV and Participating CSOs at the following trade shows:

- The National Alliance for Public Charter Schools' Annual Conference
- Participating CSO Annual Conferences

**12.3.** Marketing Plan. Provide a complete Marketing Plan on how you would help MV and Participating CSOs implement this contract to current and prospective Affiliates. MV requires the Vendor actively promote the Contract in cooperation with MV and Participating CSOs. Vendors are advised to consider marketing efforts in the areas of 1) Creating state-level implementation plans in conjunction with MV and each Participating CSO 2) Sales team and sales training programs involving both Vendor sales management and MV and Participating CSO staff.

**12.4.** Identify the sales management team that will be assigned to deliver this Contract opportunity to MV, Participating CSOs and Affiliates through your sales force.

**12.5.** Please describe your sales process and if your sales team includes both internal and external sales representatives that will interface with charter schools.

**12.6.** Please describe your sales and account management structure and incentive alignment — please indicate if representatives are responsible for both new business and existing business retention.

12.6.1. Does your sales force consist of employees, independent contractors, or third party employees?

12.6.2. Please provide a list of all applicable salespeople with their corresponding geographic territories in MS Word or Excel.

**12.7.** Identify your plan for delivering training on the implementation of this Agreement to your sales force.

**12.8. Customer Service**

12.8.1. Outline your process for responding to customer service requests and conflict resolution.

12.8.2. Indicate your service response time policy and explain any warranty programs.

12.8.3. Provide your company-wide customer retention rate.

### **13. PARTNERSHIP STRENGTH—VALUE ADDED SERVICES AND KEY DIFFERENTIATING FEATURES**

- 13.1.** Differentiation -- what key attributes differentiate your company from your competitors? Please describe how those attributes will specifically benefit charter school customers.
- 13.2.** Describe any “value added” programs or services that will improve the Buyers ability to conduct business with you. *Strong proposals will include free or discounted value-added products/services to enhance the value of this offering beyond discounted pricing. Examples might include budgeting tools, design services, etc.*
- 13.3.** Provide information on suggested practices that will make cost of doing business with your company more cost-effective or efficient.

**14. PRODUCTS AND PRICING**

**FORMAT**

*NOTE: Your response should include pricing for but not be limited to the listed products and services. Proposers are encouraged to display creativity by including other services that are related or that you believe would be of benefit to Affiliates. Including value add services or options will enhance the value of your response. Proposals shall clearly state the cost of additional offerings.*

**14.1. Product Categories**

14.1.1. Indicate which product categories you are responding to. Proposers will respond to each numbered item by checking the appropriate “BID” or “NO BID” box.

<b>CATEGORY</b>	<b>BID</b>	<b>NO BID</b>
14.1.2. APPLIANCES: Large appliances: refrigerators, stoves and ovens, disposals, trash compactors, and all ancillary supplies, tools and components.		
14.1.3. HARDWARE: Fasteners (nut/bolts, screws, washers, rivets, nails), padlocks, lock sets, wheels, casters, chain, batteries, fire extinguishers, signs, cabinet hardware, weatherization products, and all ancillary supplies, tools, and components.		
14.1.4. HEATING, VENTILATION, AND AIR CONDITIONING (HVAC): Equipment, package units, evaporative coolers, tools, parts, air filtration, thermostats, portable and fixed heaters, fans, and all ancillary supplies, tools and components.		

14.1.5. SPRINKLER/IRRIGATION EQUIPMENT AND SUPPLIES: Sprinklers, ports, timers, piping, solvents and all ancillary supplies, tools and components.		
14.1.6. JANITORIAL SUPPLIES: Cleaners, soaps, waxes, polishes, vacuums, brooms, mops, buckets, gloves, carts, paper goods, and all ancillary supplies, tools, and components.		
14.1.7. PAINTS AND COATINGS: All types of paints and coatings, caulking, spray equipment, aerosol paints, pressure washers, finishes, abrasives, epoxy, cleaners, drywall supplies, tarps, adhesives, accessories, and all ancillary supplies, tools and components.		
14.1.8. PLUMBING: Equipment, parts, piping and fittings, water heaters, filters, toilets, sinks, shower heads, faucets, water dispensing equipment, and all ancillary supplies, tools, and components.		
14.1.9. TOOLS: Hand-held (electric, battery, or pneumatic operated), power tools as needed, including accessories, welding equipment, carts and hand trucks, work benches, tool cabinets, ladders, and all ancillary supplies and components.		
14.1.10. MISCELLANEOUS: Kitchen and bath cabinets, shelving, safety and emergency equipment, first aid supplies, packaging supplies, communication supplies, electrical supplies, lighting supplies and flooring.		

## 14.2. Pricing

### 14.2.1. Line Item Pricing

Proposer shall provide a price and discount schedule for all products in the product category/ies they respond to. If multiple manufacturers and/or product lines are offered, provide a price schedule for each manufacturer and/or product

line offered. A percentage of the manufacturer's price list is preferred. Installation cost, if any, may be itemized and priced per unit, or quantity. Installation cost includes removal and disposal of packing materials. Catalog must be the regular, commonly available catalog distributed to schools. Proposers may prepare their own schedules. However, all price schedules shall follow the format and provide the information listed below. Volume discount tiers may be included where applicable. Electronic price lists must clearly be identified/labeled by including the vendor name, name of the bid and date. Electronic price lists shall be attached in Microsoft Excel and shall allow for sorting fields in the fields below:

- Manufacturer
- Manufacturer Stock or Part Number
- Vendor Part Number (if different)
- Product Description (size)
- List Price\*
- Percentage discount from List Price
- Final MV Price

*\*For the purposes of your proposal, The "List Price" shall be the price charged to an average government/education buyer absent reductions for cooperative or volume purchasing agreements.*

14.2.2. Core List: Provide a "CORE LIST" of 50-200 deeply discounted products (as anticipated and defined by Proposer to meet or exceed Affiliate charter school needs) as a separate and named spreadsheet. Include the same fields as included in the standard line-item pricing proposal above. Core List items should be based on Proposer's most frequently purchased items by charter schools and/or K-12 customers.

14.2.2.1. Core List pricing may also be used to discount and liquidate close-out and discontinued products as long as those close-out and discontinued items are clearly labeled as such.

14.2.2.2. Core List pricing is allowed to change at the discretion of the Vendor within the definition of Core List pricing. The Vendor is responsible to maintain current Core List pricing with MV.

## **15. SERVICES**

### 15.1.1. Installation Services

15.1.1.1. Describe your installation policies and procedures in detail including all aspects of customer service, if applicable.

15.1.1.1.1. Do you offer a pre-installation walk through? (Y/N)

15.1.1.1.2. Do you provide on-site installation supervision? (Y/N)

15.1.1.1.3. Does your delivery service include the following?

15.1.1.1.3.1. Assembly

15.1.1.1.3.2. Placement

15.1.1.1.3.3. Removal of debris



15.1.2. Provide a price schedule for any services offered. The preferred services price schedule will include price list date and number, your standard or list price, percent of discount offered to Affiliates.

15.1.3. New School Pricing: Strong proposals will offer deeper discounts to new schools and free planning and budgeting services. In this section, propose additional discounts and/or an exclusive value-added offering for new schools to be applied for the four-months-prior-to and two-months-after school opening. New schools are a key market segment, and can drive significant sales volume. This agreement will provide your company the opportunity to build a customer relationship with new schools from the ground-up.

15.1.4. Compare the proposed pricing and terms to large school districts, public agencies and other cooperative group purchasing organizations. Please indicate how the proposed pricing and overall total value compares to each of those GPO contracts.

## **16. TERMS AND CONDITIONS – MASTER AGREEMENT**

Attached is a Pro Forma Agreement between MV and the awarded vendor. **Proposers are advised to carefully read the Agreement and each of its specific provisions, and to indicate, with the submission of their proposal, any exceptions or proposed changes.** Please make changes to the agreement by enabling the “track changes” feature and re-attach along with your submission.

### Reporting:

As per Agreement section 6.0, the contracted Vendor will provide MV with a quarterly report of all business transacted pursuant to this Agreement for the applicable period. Please acknowledge and agree that this report can be provided with the following information:

- Affiliate Name
- Affiliate Address
- Sale amount
- Sale date
- List price
- Savings amount

### Signature Tool:

MV intends to use an electronic signature tool to facilitate the execution of the Participation Addendum. Please acknowledge and agree that this method of contract execution is acceptable to your company.

**Submissions that do not include a revised or signed copy of the agreement will be considered incomplete**