

#	Cooperative Organization Questions	Response
1	<p>Are your organization’s cooperative contracts available for use by Arizona public entities? If so, do you have any local representation?</p>	<p>Yes, Equalis Group contracts are available for use by Arizona public entities and Nancy (Davis) Burns, who resides and works in Phoenix, Arizona, is our local representative. Our requests for proposals are published in 18 national and local newspapers of general circulation across the country, including the Arizona Business Gazette, to maximize exposure to potential respondents and increase competition. In addition, Equalis Group solicitations align with state-specific requirements, including Arizona’s procurement guidelines, executive orders, and Arizona Revised Statutes.</p>
2	<p>What is the legal formation of your cooperative organization (public, non-profit, for profit, etc.)? How long have you been established?</p>	<p>Equalis is a privately held company with a legacy dating back to 2005. We serve as the 3rd party administrator for multiple lead public agencies.</p>
3	<p>Does your organization conduct its own procurements with in-house personnel or does it enlist a public agency to conduct the procurement? If a public agency is utilized, please identify that agency or agencies and briefly explain how those agencies are selected.</p>	<p>Equalis Group utilizes the lead public agency model. Our primary lead public agencies are Cooperative Council of Governments (CCOG) in Ohio and Region 10 Education Service Center (Region 10) in Texas. <b>The foundation of Equalis Group’s contracting philosophy is to consistently execute a high-integrity, transparent, and competitive process.</b> We carefully evaluate the leadership and procurement procedures of potential lead agencies and only partner with lead agencies who have a demonstrated track record of and commitment to maintaining the highest standards in the procurement process.</p> <hr/> <p><b>Region 10</b> entered into an agreement with Equalis Group to serve as the Primary Lead Agency in a new purchasing cooperative designed to deliver best-available pricing to Region 10’s K-12 members. <b>About Region 10 ESC:</b> Region 10 is one of 20 regional service centers established by the Texas State Legislature in 1967 for the purpose of providing services to school districts. Based in Richardson, Region 10 and its consultants impact over 865,000 students and 106,000 school staff members, of which 56,000 are teachers in over 130 Independent School Districts, charters, and private schools across ten north Texas counties.</p> <hr/> <p>Sourcing Alliance (an Equalis company formed in 2005) and the <b>Cooperative Council of Governments</b>, an Ohio political subdivision formed under Section 167 of the Ohio Revised Code and a 501 (c)(3) nonprofit, partnered in 2013 to make CCOG’s publicly procured group purchasing agreements available to political subdivisions, educational institutions, local governmental entities, state agencies, the federal government, for-profit companies, and not-for-profit entities across the country. <b>About CCOG:</b> Cuyahoga County Public Library (the nation’s top-ranked public library system serving a population of at least 500,000 people for more than 10 years in a row) and Kenston Local Schools (one of Ohio’s highest-ranked public school districts) formed CCOG in 2013 to serve as Sourcing Alliance’s primary lead agency for the express purpose of (a) improving Sourcing Alliance members’ operations, reducing their costs, and increasing their efficiencies to augment their capacity to better serve their constituents and customers, and (b) developing and operating as a collective purchasing and service organization to enable Sourcing Alliance members to obtain competitive terms from vendors and service providers by utilizing the combined purchasing power of all Sourcing Alliance members. The City of Solon (one of the top-ranked cities in Ohio) joined CCOG in 2019. Today, CCOG is governed by a board comprised of senior leaders from the Library, Kenston, and Solon.</p>

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4	If your organization handles all of the contracting functions in-house please explain if you periodically have a 3rd party audit firm review your internal contracting procedures.	Equalis Group utilizes the lead public agency model. Our lead agency partners are subject to their own annual audit requirements. These audits review both financial matters as well as internal controls relating to their core processes, including the procurement process.
5	What governing procurement laws does your organization follow in the soliciting, evaluating and awarding of cooperative contracts? (Please be specific.) Also, what state is noted as the legal venue within your contracts for dispute resolution?	Equalis Group utilizes the lead public agency model. Our lead agency partners are subject to their own annual audit requirements. These audits review both financial matters as well as internal controls relating to their core processes, including the procurement process.
6	Does an agency need to register or sign an agreement with your organization in order to purchase from your contracts? If so, please attach the registration form or agreement. Also, is the agency charged a fee to join your cooperative organization?	Registration with Equalis Group has no cost, fees, or spend requirements. Agencies can register and e-sign the membership agreement via the Equalis Group website at this link: <a href="https://equalisgroup.org/member-registration/">https://equalisgroup.org/member-registration/</a> . Agencies requiring a wet signature may download the form from the same site and email their signed member registration form to: <a href="mailto:Membership@EqualisGroup.org">Membership@EqualisGroup.org</a> . A Membership FAQ document is also available for download here: <a href="https://equalisgroup.org/wp-content/uploads/2021/06/FAQ-Questions-About-Membership.pdf">https://equalisgroup.org/wp-content/uploads/2021/06/FAQ-Questions-About-Membership.pdf</a> .
7	Where can your organization's cooperative solicitations and resultant contracts be viewed? Describe what documentation is available at this site.	Equalis Group RFP and contract documentation is publicly available on our website with no login/password required. We have a contracts landing page here: <a href="https://equalisgroup.org/contracts/">https://equalisgroup.org/contracts/</a> . Each awarded supplier has a dedicated landing page that prominently includes RFP and contract documentation available for review and/or download. RFP and contract documentation includes: a contract confirmation letter, Contract #, the Lead Agency that issued the contract award, Contract Term, Renewable Through date, Original RFP, Q&A, Proof of Publication, Awarded Supplier's RFP Response, Award Letter, and Master Agreement. Additional contract documentation may include Cost Analysis, Pricing tables, or any other contract specific documentation.
8	Do you periodically perform audits to ensure your contractors are fulfilling the contracts to include charging the correct price? If so, please briefly describe your internal audit program and explain if that program includes any benchmarking to ensure pricing stays competitive over the term of agreement.	Upon request, Equalis Group provides pricing validation on projects and purchases for member agencies to ensure compliance to contract. In some cases, Equalis Group audits each project price proposal for contract compliance before the proposal is submitted by the vendor to a member. Equalis Group has conducted numerous pricing audits to ensure price changes are properly applied and spot checks published pricing online to ensure such prices comport with the contract pricing. Additionally, our lead agencies have processes in place to ensure that price value remains constant throughout the life of the agreement. Any proposed price changes authorized by the master agreements are evaluated and validated before those changes are implemented and Equalis Group and the two lead agencies require supporting documentation for proposed price changes.
9	What is the total employee count for your cooperative organization? How many employees perform specific contracting functions (solicitation development, bidding, evaluation and awarding of contracts)?	Equalis Group currently employs a staff of 13 individuals. There are two employees dedicated to contracting efforts in conjunction with our lead agencies. These individuals are involved in the identification of potential RFP categories, researching the categories, identifying and contacting potential respondents to increase the number of competitive proposals received, solicitation development, bidding, evaluation, and contract awards. A third individual is responsible for ensuring RFP and contract documentation is published and maintained on each awarded supplier's dedicated landing page and updating the posted documentation if there are any modifications to the underlying contract documents.

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10	Describe your approach to customer service and include any response time commitments.	<p>Equalis Group is a Member-Driven, Supplier-Centric organization that embodies the power of partnership. Equalis operates with the guiding principle that when the objectives of buyers and sellers are aligned, sustainable value is created, transcending that of the typical short-term transactional relationship. The Equalis Group team is highly responsive to both participating agencies/organization as well as to the awarded contract supplier community. Each Equalis Group member is assigned a single point of contact and provided that individual's email address, office phone number, and cell phone number within 24 hours of joining Equalis Group. Our policy is to respond to any member inquiry same day/within 24 hours. Members are advised to contact their dedicated team member in the event any issues arise for that member with any awarded supplier.</p>
11	How do you generate your bidders' list for any particular solicitation and what steps do you take to ensure Arizona companies are included in your notice?	<p>Equalis Group generates bidders' lists by: 1) researching the industry to identify potential bidders, 2) contacting potential bidders via phone and email to advise them of the upcoming RFP publication, 3) identifying potential respondents from vendors who have registered on our website, and 4) seeking recommendations from members. We publish notice of each solicitation in 18 national and local newspapers of general circulation across the country, including the Arizona Business Gazette, and proactively distribute each solicitation to all identified potential bidders.</p>
12	How do you evaluate contractor performance? Do you have a process that allows agencies to report vendor deficiencies?	<p>We evaluate vendor performance in a number of ways. Typically, we develop and execute a marketing/sales plan with each awarded supplier that includes specific activities, timeframes, and responsibilities. We then manage the implementation of the plan and provide supplier accountability. We conduct annual business reviews with most suppliers, and have regular (weekly, bi-weekly, monthly, or quarterly) scheduled cadence calls with the suppliers that are most active with our membership. We carefully track spend with each supplier as described in our response to Question 14. We have weekly internal meetings with our Member Engagement team to track activities and progress, as well as monthly meetings with the Member Engagement Team, the operations team, and the Equalis Group senior leadership team to evaluate activities and performance with each awarded supplier. We strongly encourage members to report any vendor deficiencies to their designated point of contact and have internal processes in place to promptly follow up on and address any identified deficiencies.</p>
13	Indicate any national cooperative coalitions/associations to which your organization is a member.	<p>National: NIGP, NAEP, ASBO International; Regional: AASBO - Arizona Association of School Business Officials</p>
14	How do you track the usage of contracts to ensure you are accurately conveying order volume within your solicitations?	<p>Our operations and reporting team receives detailed reporting from each awarded supplier on a monthly or quarterly basis as agreed in the master agreement. This reporting is uploaded into our proprietary database, which tracks the purchasing of each member through each master agreement. We have built numerous Microsoft BI reports to monitor spending on an individual member basis and in the aggregate. We also have systems in place to identify when there are spending anomalies and investigate any such anomalies that occur. We also track transactions throughout the sales process and monitor whether completed transactions are included in subsequent supplier reporting - we have a follow up process in place to proactively pursue reporting of closed transactions that are not included in our monthly/quarterly reports.</p>