

## Frequently Asked Supplier Questions:

### **Q: What differentiates Equalis Group from its competitors?**

A: Equalis operates differently from our competitors. By taking a Member-Driven, Supplier-Centric approach and concentrating on the quality of our agreements rather than the number of suppliers on contract, we are better positioned to create growth opportunities for our awarded suppliers while continuing to improve value and savings for our members. Our Master Agreements are designed to maximize flexibility, from the breadth of your product and service offerings available to customizable pricing.

### **Q: How is Equalis Group communicating the launch of my awarded agreement to its members?**

A: All awarded agreements will be published on <https://equalisgroup.org/contracts/> as well as through Pardot © campaigns, direct engagements member engagements, and Co-Branded One-Page reference sheets.

### **Q: How do I validate that a customer belongs to Equalis Group?**

A: A roster of our current members will be sent out to all suppliers monthly, or upon material change. If you are unsure of a customer's current membership within Equalis Group, please reach out to Stephanie Harris at [stephanie.harris@equalisgroup.org](mailto:stephanie.harris@equalisgroup.org).

### **Q: I am working with a current or prospective customer and would like to get them signed up with Equalis Group. What does that process look like?**

A: Becoming a member is very simple and can be completed in less than five minutes. Please direct the prospective member to visit our enrollment link at <https://equalisgroup.org/member-registration/>.

### **Q: How Do I connect Equalis Group members to my awarded agreement?**

A: Equalis Group members can be connected to an awarded agreement by tying the Equalis Group Member ID and Equalis Group Contract # to the customer profile specific to your organization or indicated within a purchase order.

### **Q: What if I would like to add a service or product not listed within the awarded agreement? What if a product or service listed within the awarded agreement has changed or is discontinued?**

A: For all awarded agreement questions that pertain to products or services, please reach out to either David Robbins, Director of Product Development at [drobbins@equalisgroup.org](mailto:d Robbins@equalisgroup.org) or Eric Merkle, SVP at [emerkle@equalisgroup.org](mailto:emerkle@equalisgroup.org)

### **Q: How do I report purchases made by Equalis Group members under my agreement?**

A: Member-related spend reporting, due on the 15<sup>th</sup> of each month, can be sent to [reporting@equalisgroup.org](mailto:reporting@equalisgroup.org). If you have any questions on how to report member purchases, please reach out to Laura Rich at [lrich@equalisgroup.org](mailto:lrich@equalisgroup.org)

## Frequently Unasked Supplier Questions:

### **Q: What does it mean to be “in compliance” with public sector procurement guidelines?**

A: Public sector entities (local governments such as municipalities, counties, and special districts as well as K-12 schools and institutions of higher education) are subject to strict guidelines that define the processes through which they are allowed to spend taxpayer dollars. When public sector entities strictly follow these guidelines to purchase products and services, they are in compliance. When the process public sector entities follow to make purchases deviates from these guidelines, they are out of compliance; public sector entities strive to avoid being out of compliance at all costs for the reasons more fully defined below.

### **Q: How and where are public sector procurement guidelines defined?**

A: Each state has statutes that define the public sector procurement guidelines for public sector entities in that state. The challenge is that there is not just one set of guidelines that applies to all of the public sector entities within a given state. Rather, the way state statutes are written is that most/all of the statutes relating to a particular type of entity are grouped together in one section. So, there will be an entire section of code devoted to how counties operate within that state, and there are subsections of the code for counties that define how counties are allowed to spend money on various types of products and services. Similarly, there will be other sections of code for public K12 schools, cities, towns, villages, libraries, sewer districts, transit authorities, water departments, community colleges, state universities and so on, with each of those sections including subsections defining the ways that each of those entity types is required to spend taxpayer dollars. And there are different subsections for different types of products and services – the rules for purchasing utilities, engaging consultants, building facilities, purchasing supplies, and so on are defined in separate subsections. In other words, there can be literally hundreds of different subsections of code in any given state that define how specific public sector entities in that state can procure specific products and services.

If you want to find the purchasing guidelines for a specific type of entity in a particular state, initiate a search through your Internet browser using terms such as “Ohio” (the name of the state), “state laws” (to narrow the search to that state’s statutes or codes), “counties” (the type of public sector entity), and “purchase” (to narrow the search to procurement guidelines). Happy reading!!

### **Q: Why is public sector procurement compliance important to me?**

A: Exposure and risk. If you win public sector business that was awarded to you through a non-compliant process, you are at risk of:

- Losing the business.
- Having to repay any revenue you have received.
- Receiving negative publicity that can affect your ability to win additional public sector business in the future.

### **Q: Why is public sector procurement compliance important to my customers?**

A: Again, exposure and risk. If your public sector customers award business to you (or any supplier) through a non-compliant process, they are at risk of:

- One or more vendors who were not awarded the contract challenging the award.

- Negative findings or findings for recovery publicly identified in the customer's annual audit that is conducted by the state auditor's office.
- The public official(s) who awarded the contract inappropriately being personally liable to repay to the public sector entity any payments already made to the supplier. Think about that for a moment – a government employee who inappropriately awards a \$100,000 contract to a vendor might have to pay that \$100,000 back out of their own pocket.
- Bad headlines or other negative publicity for the public sector entity or government employee. As you can imagine, officials in the public eye seek to avoid bad press like the plague.

**Q: Who is responsible for public sector procurement compliance?**

A: Technically, the public sector entity conducting the procurement process is responsible for adhering to all applicable procurement guidelines. Practically, however, both the buyer and the seller are at risk if the buyer does not follow applicable public sector procurement guidelines.

**Q: Are there compliant alternatives to the standard public sector procurement process?**

A: There are two compliant alternatives to traditional public sector procurement processes that i) apply to virtually all public sector entities across the country, and ii) provide a compliant exemption from a public sector entity having to conduct its own procurement process, which therefore provides suppliers with an alternative to having to respond to one bid at a time to win public sector business:

1. Establishing and leveraging state term contracts. State term contracts are agreements established between a state government and a supplier allowing that supplier to sell some or all of its products and services to state agencies without each state agency having to conduct a stand-alone bid process. These contracts may be awarded through a formal state agency procurement process or established through a registration process. A critical feature of state term contracts is that each state's laws allow for political subdivisions or public sector entities within that state to legally and appropriately purchase products and services through state term contracts without having to conduct their own bid or RFP process.

2. Establishing a piggybackable agreement, typically with a public sector cooperative purchasing organization. Pursuant to laws in each state, most public sector entities have the ability to purchase through cooperative agreements awarded to suppliers by other public sector entities without having to conduct their own procurement process. Purchasing through these contracts without conducting a stand-alone procurement process is called "piggybacking", and such contracts are considered "piggybackable" or "already-procured" or "cooperative" contracts. To utilize a public sector cooperative's piggybackable contracts, public sector entities typically are required to join the cooperative as a member, which provides them with the option to purchase through any of the cooperative's contracts.

The pricing and contract terms available to cooperative members are memorialized in a "master agreement" between the supplier and the cooperative. The cooperative's members are then eligible to purchase directly from the supplier directly under the master agreement's pricing and contract terms.



## Overcoming Common Customer Objectives:

### **Q: Why do I need another Cooperative Purchasing Organization?**

A: In a landscape that is crowded with local, regional, and national cooperatives, it can be easily understood why you may be hesitant to utilize *another* organization. By being more selective in the supplier partners we award contract vehicles to, prioritizing the quality of our agreements over the sheer volume of agreements available, Equalis Group balances the objectives of our suppliers and members in a way that creates substantial value and a higher level of engagement across the board. Additionally, this approach has allowed Equalis Group in some instances to secure contract vehicles that are not available anywhere else, as well as best in market pricing, as supplier partners understand the power of Equalis.

### **Q: How will Equalis Group service my organization?**

A: Equalis Group remains committed to providing exceptional service and engagement to members of our cooperative, and is driven by a desire to help meet your procurement objectives, be it creating efficiencies within your procurement office, or finding you the best value on an order of pens. We understand that each member has unique needs and priorities, and tailor our approach accordingly, rather than offering up a cookie-cutter solution that lacks personalization. Further, Equalis Group is highly experienced in navigating the nuances of public sector procurement and will be your organization's resource in staying compliant, while simultaneously saving you time and financial capital, ultimately reducing total cost of ownership.