



# Equalis Group Delivers *Public Sector Compliance*

## Remain in Compliance with Equalis Group

The Public Sector procurement process is riddled with nuances and regulatory considerations established to safeguard how taxpayer dollars are spent. It is often overwhelming and confusing as purchasers navigate strict guidelines and a combination of local, state, and federal statutory requirements, but it doesn't have to be.

There are three compliant avenues for Public Sector entities to spend taxpayer dollars: 1) conducting stand-alone bids/RFPs/RFOs; 2) purchasing through State Term contracts; and, 3) buying through the types of competitively solicited cooperative agreements Equalis Group offers.

We leverage our extensive Public Sector procurement acumen and decades of experience to ensure our members remain compliant when utilizing our publicly procured cooperative agreements to save time and money.

Equalis Group partners with Lead Agencies, Region 10 Educational Service Center (**Region 10 ESC**) in Texas and The Cooperative Council of Governments (**CCOG**) in Ohio, to conduct rigorous and transparent competitive public sector procurement processes for critical products and services. Winning suppliers, distributors, and manufacturers are selected based on both qualitative criteria and pricing. We then establish compliant already-procured Master Agreements with these winning vendors that are available to public agencies nationwide.

## Equalis Group's Compliant Solicitation Process

### Step 1



#### Prepare Solicitation

Lead Agency identifies member needs

### Step 2



#### Publish Solicitation

Lead Agency publicly advertises & proactively distributes solicitation

### Step 3



#### Open Proposals

Vendors submit proposal responses

### Step 4



#### Evaluate & Award

Lead Agency evaluates responses using transparent criteria & issues contract awards

### Step 5



#### Establish Master Agreement

Lead Agency negotiates final contract & posts on [www.EqualisGroup.org](http://www.EqualisGroup.org)



In short, Equalis Group collaborates with our Lead Agencies to deliver compliant, publicly procured cooperative agreements that Public Sector entities across the country can utilize to: *i)* quickly acquire the products and services they need; *ii)* receive better pricing through the collective buying power of Equalis Group Members; and, *iii)* save time through Equalis Group's legal and compliant alternative to conducting their own resource-consuming solicitation process.

# Created by Public Sector Organizations *for Public Sector Organizations*



## Who is Equalis Group?

Equalis Group is a Member-Driven, Supplier-Centric organization that embodies the power of partnership. Equalis Group 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. With this differentiated approach, Equalis Group is not just a cooperative purchasing organization; we are a family.

We leverage Equalis Group members' combined buying power to command better pricing and favorable contract

terms from suppliers. We develop and administer a diverse portfolio of cooperative purchasing programs that cover a wide range of products and services and provide our members with a legal and compliant exemption to the bid/request for proposals (**RFP**) process.

Each program in our rapidly growing portfolio provides our members with contracting compliance and the ability to configure the solution that best meets their individual needs while achieving the lowest Total Cost of Ownership.

## Time Saved through Equalis Group = More Resources for You to Invest

How many hours and over how many weeks or months does your team invest in a typical solicitation process? How many solicitations does your organization publish each year? How much time and effort can your organization save by leveraging Equalis Group's already-procured portfolio of programs? In what ways can you re-invest that saved time and energy to fulfill your organization's purpose?

### Your Solicitation Process Today



### Your Implementation Process with Equalis Group



## *Become a Member of Equalis Group*

If you are not already a member, you can join Equalis Group in just minutes and immediately access our portfolio of cooperative purchasing programs. Simply visit [www.equalisgroup.org/member-registration](http://www.equalisgroup.org/member-registration) to get started. There are no dues, fees, or obligations.



## Lockton & Equalis Group Publicly Procured Master Agreement Contract # R10-1125A

Region 10 Education Service Center (**Region 10**), an Equalis Group Lead Agency, issued RFP #R10-1125 for Employee Benefits Consulting for Texas on August 8, 2021 and subsequently entered into Contract #R10-1125A with Lockton.

Additional information regarding the procurement process and contract award can be found on the [Lockton page](#) at the Equalis Group website, including the Lockton products and services available through the Master Agreement, RFP and scoring documents, the Master Agreement between Region 10 and Lockton, and pricing/discount model.

### Entities Eligible to Purchase from Lockton through the Master Agreement

This contract vehicle is immediately available to existing Equalis Group Members.

Not a Member yet? Any public sector entity in the country can join Equalis Group and begin utilizing any Equalis Group competitively solicited master agreement by completing the [membership registration form](#). New Members receive a fully executed copy of their completed membership form via email immediately and will receive their Equalis Group membership number within one-to-two days. There are no dues, fees, or obligations and completing the form takes less than five minutes.

### Help with Membership, Procurement Questions & Navigating Our Contract Portfolio

Equalis Group's dedicated Member Engagement Team exists to support our Members. The team is readily accessible and is prepared to answer questions about membership, public sector purchasing compliance, Equalis Group's procurement and contracting processes, and our expansive portfolio of already-procured contract vehicles. Current and prospective Members can find their Member Engagement Team point person and direct contact information [here](#).

View all Equalis Group contracts and download a sortable Excel file with key information about each contract in our ever-expanding portfolio [here](#).

### About Equalis

Equalis Group is a Public Sector purchasing cooperative. We deliver compliant, publicly procured cooperative agreements that Public Sector entities across the country can utilize to: *i)* quickly acquire the products and services they need; *ii)* receive better pricing through the collective buying power of Equalis Group Members; and, *iii)* save time through Equalis Group's legal and compliant alternative to conducting their own resource-consuming solicitation process.

Equalis Group partners with two primary Lead Agencies, Region 10 Education Service Center (**Region 10**) in Texas and The Cooperative Council of Governments (**CCOG**) in Ohio, to conduct rigorous and transparent competitive public sector procurement processes for critical products and services. Winning suppliers, distributors, and manufacturers are selected based on both qualitative criteria and pricing. The Lead Agencies then establish compliant already-procured Master Agreements with the winning vendors available to all agencies that join Equalis Group.



*Lockton Dunning is passionately committed to serving our Clients*



UNCOMMONLY INDEPENDENT



## Lockton & Equalis Group

*Publicly Procured Contract Vehicle*

### Lockton Contract Highlights

- We believe in **SERVICE**. We act as our clients' strategic partners to improve their organization. Lockton's (**LDB's**) service teams maintain 24/7 connectivity and do not impose limitations on time, travel, meetings, and/or deliverables. Our in-house legal counsel provides support on all federal, state, and local legislative/regulatory issues.
- We believe **BIG DATA** drives big results. LDB's investment in our data warehouse, Infolock®, is based on the premise that key data informs better decisions.
- We believe in **TRANSPARENCY** and stand by this commitment. We provide a comprehensive scope of services and transparent pricing. We do not bill hourly and do not believe in surprise billing practices. Customer engagement begins with a full audit of all benefit plans.

### Who is Lockton?

Lockton Dunning has a long and successful history of serving public-sector clients including, but not limited to municipalities, counties, school districts, hospital systems, political subdivisions and institutions of higher education. Lockton Dunning offers expertise to identify benefits and service opportunities, as well as focused solutions to meet the needs of each and every one of our client's unique population.

We provide the expertise, intellectual capital, and resources required to deliver our clients and their employees best in class Health & Welfare programs that are fiscally responsible and provides our client's valued employees the richest benefit level possible.

**Save Time...** we've done the procurement work so you don't have to.

**Save Money...** your dollar goes further with the collective buying power of Equalis Group.

**Stay Legal...** our competitive procurement process delivers statutory compliance in every state.

**Contract #:** R10-1125A

**Lead Agency:** Region 10 ESC

## Get Started



*Learn more about how we can help you achieve your procurement goals while Saving Time, Saving Money & Staying Legal. Email [Engage@EqualisGroup.org](mailto:Engage@EqualisGroup.org) or visit [EqualisGroup.org/Map](https://EqualisGroup.org/Map) to connect with your dedicated Member Engagement Resource today.*



## Membership FAQ

**Save Time. Save Money. Stay Legal. That's our commitment to our members.**

### Why Become A Member Of Equalis Group?

Your organization receives immediate access to our [expanding portfolio](#) of compliant, already-procured contract vehicles. These contracts are designed to achieve the lowest Total Cost of Ownership for our members, delivering the best possible overall value. Our contracts feature enhanced contract terms and conditions and aggressive pricing not typically available to individual entities purchasing independently. There is strength in numbers when it comes to buying products and services.

### How Does Equalis Group Work?

Equalis Group collaborates with our Lead Agencies to deliver compliant, publicly procured cooperative agreements that Public Sector entities across the country can utilize to: *i)* quickly acquire the products and services they need directly from our awarded suppliers; *ii)* receive better pricing through the collective buying power of Equalis Group Members; and, *iii)* save time through Equalis Group's legal and compliant alternative to conducting their own resource-consuming solicitation process.

### What Types Of Entities Are Eligible To Join?

Equalis Group membership is available to federal, state, and local government agencies; public and private educational institutions, including K-12 schools, colleges, and universities; non-profit organizations; and private sector companies. Typically, any individual within an organization who is authorized to sign documents on behalf of the organization can complete the membership form without any formal board action, although approval requirements do vary from state to state.

### What's The Catch?

There is no catch. There is no cost to join Equalis Group, and there are no membership dues or obligations of any kind. Joining Equalis Group is like getting a library card – membership simply ensures your organization has access to our contract portfolio. You decide which contracts to utilize and when.

### How Do I Join?

Joining Equalis Group online takes less than five minutes. Simply visit our [Join Page](#) and follow the instructions provided.

If you would rather send us a hard copy of the Membership Agreement, download the Agreement from our [Join Page](#) and email the signed PDF to [Membership@EqualisGroup.org](mailto:Membership@EqualisGroup.org).

### What Happens After Joining?

Immediately after completing the [membership registration form](#) you will receive an email confirmation letting you know that your membership is being processed. Within one to two business days, Equalis Group will email your welcome email, which includes your membership number. To begin purchasing, simply provide your membership number to an Equalis Group awarded supplier and you will receive the improved pricing and other benefits of our competitively solicited contracts.

### Who Do I Contact For Questions Or To Begin Utilizing Equalis Group Contracts?

If you have any questions about the membership process, would like to learn more about any of our already-procured contracts, or want to start purchasing through one or more of our publicly procured agreements, visit [www.EqualisGroup.org/Map](http://www.EqualisGroup.org/Map) to connect with your dedicated Member Engagement Resource today or send an email to [Engage@EqualisGroup.org](mailto:Engage@EqualisGroup.org).