

Checklist Leading to a Responsive PEPPM Bid in California

The following checklist is offered to assist bidders in submitting a responsive bid. It was created to help ensure you submit the proper materials. It will help you eliminate some of the most common mistakes by bidders. It is not a substitute for reading the Terms and Conditions and following all the directions and requirements contained in the Terms and Conditions.

1. Start Early

- ☐ **A.** Immediately start reviewing Terms and Conditions and distribute them to all appropriate parties within your company. This can be one of the most time consuming tasks, so get started early.
- ☐ **B.** Ask three of your school district or public agency customers to fill out a reference form and return it to you. Since this involves three outside parties, get started early.
- ☐ **C.** Complete the Sources of Supply document explaining your source of supply for all the brands of products you are offering in your Catalog.
- ☐ **D.** Find or download a representative sample of manufacturer SKU numbers for each brand of products you are offering in your Catalog.

2. The Electronic Bid Form Questions

- ☐ **A.** You have answered all questions on the bid form.
- ☐ **B.** You have described your marketing plan in the Response Column or attached a marketing plan as a PDF document.
- ☐ **C.** You have attached signed reference forms from three school districts or public agencies (in the case of a wholesaler, references can be from vendors).
- ☐ **D.** You are paid up and timely on all past PEPPM transaction fees.
- ☐ **E.** The Terms and Conditions were read and accepted.
- ☐ **F.** If you have any objections to the Terms and Conditions, you submitted them by email to BidQuestions@PEPPM.org by the Exceptions Due Date, which is well before the final bid deadline.

3. The Electronic Bid Form's "Product Line" Section

- ☐ **A.** You have clicked the white "Bid" box alongside the names of the Catalog types you are bidding.
- ☐ **B.** A source of supply document explaining your supply chain is attached alongside the name of each Catalog category you are bidding.
- ☐ **C.** A policy on the return of goods is attached alongside the name of each Catalog category you are bidding.
- ☐ **D.** If offering services, you have attached an Ancillary Services Form with any supporting documentation alongside the name of each Catalog category you are bidding.
- ☐ **E.** You have attached a Rest of Catalog Price Template alongside the name of each Catalog category you are bidding and marked it as the SKU template.
- ☐ **F.** A signed and dated Awarded Vendor Agreement is attached as a PDF alongside each Catalog category you are bidding.
- ☐ **G.** You have attached a list of all the manufacturers represented in your Catalog, preferably as an Excel file, alongside each Catalog category you are bidding.

4. PEPPM Bid Price Submission Template

- ☐ **A.** You did not attempt to change or manipulate the underlying Rest of Catalog Price Template (modifying the underlying spreadsheet will make it impossible to upload into the bidding software).
- ☐ **B.** The Quote Sheet is filled out with your discount formula offers.
- ☐ **C.** If you have variable discounts or mark-ups, each category of discount or mark-up is clearly identified with the percentages you are offering.
- ☐ **D.** Your Price List used for Price Basis is identified on the Quote Sheet.
- ☐ **E.** The effective date of the Price List used for Price Basis is identified.
- ☐ **F.** If you have more than 30 categories of discounts or mark-ups, a separate spreadsheet is attached or you have grouped several categories with a single discount percentage.

- ☐ **G.** The Bid Response tab is filled out with your Rest-of-Catalog products and effective prices representing each manufacturer in your Catalog.
- ☐ **H.** You have left no blank rows between any of the line-items on your Bid Response tab.
- ☐ **I.** Each representative product listed has a true manufacturer SKU, not a vendor SKU or a hybrid vendor-manufacturer SKU.
- ☐ **J.** The discounts for each line item on the Bid Response tab true-up with the discounts offered for each category on the Quote Sheet.
- ☐ **K.** No new percentages are listed on Bid Response tab that are not identified on the Quote Sheet.
- ☐ **L.** The calculated, effective price shown on the Bid Response tab is the exact price you intend to be the result of your bid.
- ☐ **M.** After it is completely filled out, the Rest of Catalog Price Template has been uploaded into the bidding software alongside the Catalog category name.

5. Additional Response Information Section on the Electronic Bid Form

- ☐ **A.** The submitted bid must be valid and irrevocable for one-hundred twenty (120) days after the official opening time and date. Set this date on the bid form as 10/4/2025.
- ☐ **B.** Any leasing information required by the bid is submitted as an additional attachment in this section.
- ☐ **C.** Any other attachments required or offered – and not directed to be placed elsewhere in the bid -- are uploaded in this section of the electronic bid form.
- ☐ **D.** If you have exceeded the limitation on the number of attachments anywhere else on the bid, these extra attachments would be uploaded here.

6. Submissions

- ☐ **A.** You have hit the submit button on the electronic form and the status of the bid in your in-box says “sent.” (You should submit your bid at least one day early to avoid errors, missing documents, unanswered questions, heavy internet traffic, or computer problems.)