



Association of Educational  
PURCHASING AGENCIES

## AEPA Contract Extension Recommendation Form

Solicitation Number: 021.75 Category: HVAC and Mechanical Products and Solutions  
Vendor Name: Carrier Corporation

This is the Vendor's 3rd contract year with AEPA under the current solicitation.

How many member states originally indicated they would participate in the category? 22

### Contracts and Sales

How many participating states signed contracts this year? If not, why? 22 states responded. 17 signed the renewal whereas 5 indicated no contract.

How many participating AEPA states had sales this year? 2 (CA & TX)

Contract Volume as reported by AEPA Member States:

Year 1 \$ 0

Year 2 \$ 5,741,864

Year 3 \$ 23,328,419

Are sales growing? ☒ Yes ☐ No ☐ N/A

Has the Vendor Partner sent sales reports to members? ☒ Yes ☐ No

Has the Vendor Partner reported sales numbers to AEPA, as required? ☒ Yes ☐ No

Have there been complaints from the AEPA states regarding the Vendor Partner's pricing or other practices? ☐ Yes ☒ No If yes, explain below.

No marketing efforts, therefore no sales in many states are the biggest concern.

### Interaction with AEPA

Has the Vendor Partner designated a person or team as their AEPA lead? ☒ Yes ☐ No

Does the Vendor Partner communicate with the committee chair?

- ☒ Yes, Vendor representative initiates communication
- ☐ Yes, Vendor representative responds to calls, emails, etc.
- ☐ No

Has the Vendor Partner attended AEPA Meetings? ☒ Yes ☐ No

Is there evidence that the Vendor Partner's sales force and/or dealer network understands AEPA? ☒ Yes ☐ No

Does the Vendor Partner provide the product/service to the customers as described in the bid submission? ☒ Yes ☐ No

Comments:

Vendor partner is very responsive. They have reputable brand nation-wide so has a potential of sales.

## Marketing

Is there a proactive marketing plan in place? ☒ Yes ☐ No

Is there evidence that the sales force actively markets the AEPA contract? ☒ Yes ☐ No

Have there been complaints from AEPA members regarding the Vendor Partner's marketing practices?  
☒ Yes ☐ No

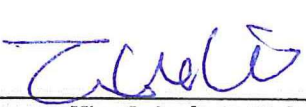
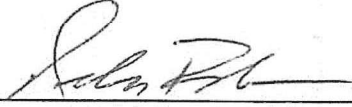
Comments:

Need a local rep in NE. Need to improve marketing in NM.

## Recommendation:

- ☐ The Committee recommends **contract extension** with the Vendor Partner.
- ☒ The Committee recommends **contract extension** with the Vendor Partner with a plan to improve the following areas:  
More proactive marketing action and frequent communication with member states
- ☐ The Committee does NOT recommend contract extension with this Vendor Partner.

Category Chair – Name & Signature:

   
Thomas Kim & Andrew Pickens

Committee Member: Tina Smith