



YMCA Shared Services, Inc. Prospective Vendor Letter

March 24, 2017

Thank you for your recent interest in conducting business with YMCA Shared Services, Inc. and all of our member Ys. In order to develop strong working relationship and ensure that all our vendors comply with our business standards, we require all vendors that we work with to be vetted through our internal review process. The process begins with our YMCA Shared Services, Inc. Vendor Application (attached). Please complete the Application in its entirety and return it with the additional documents required to YMCA Shared Services, Inc. via email or US Postal Service to the person(s) and address below. Incomplete Applications will result in a delay of the qualification process. To ensure our records are complete, vendors will be asked to complete a similar application every two years.

The information provided on this application is sensitive in nature and includes, but is not limited to, your federal identification number and/or social security number. Please be advised that this information is retained for internal use only by YMCA Shared Services, Inc. and our member Ys. We do not sell or share vendor information with any undesignated parties. We only require such information for our tax reporting purposes and to conduct background checks when necessary. If you choose not to comply with our request for information, we will be unable to add you to our active, approved vendor listing, and you will be restricted from doing business with us and any of our member Ys.

After the YMCA Shared Services, Inc. Vendor Application and additional documents required have been submitted, our internal review process will continue as follows:

1. Confirmation of receiving your application and other documents will be sent via email to your *business representative* listed on the form.
2. Your application will be reviewed and the *business representative* will be contacted to arrange a meeting in order to discuss possible procurement options and opportunities.
3. Proposed/agreed purchasing program will be documented or summarized in our YSS Purchasing Program Outline document (attached).
4. The *business representative* and any others will be notified of being added to YMCA Shared Services, Inc. (*active*) YSS Approved Vendor List.

Upon being placed on our (*active*) YSS Approved Vendor List, we require all vendors to follow our purchasing and invoicing protocols. Most of our participating member Ys require pre-approved purchase orders (POs) before any orders are placed and in order to pay any invoices. As you know, purchase orders serve as a confirmation that these items or services were authorized by appropriate personnel. Lack of compliance to purchasing and invoicing protocols will result in a delay of payment.

If you have any additional questions or need any assistance in completing this form, please contact Paul Slovin at pslovin@ymcasharedservices.org or 617.9278132.

We look forward to a long and prosperous relationship with you and your company!

Sincerely,

Paul J. Slovin
Director of Procurement



YMCA Shared Services, Inc. Vendor Application

Business Information

All information being provided will be kept confidential.

Company Name: Nextiva, Inc.

Legal Name: _____
If different from company

Address: 8800 E. Chaparral Rd. Ste 300
Street Address *Apartment/Unit #*
Scottsdale AZ 85008
City *State* *ZIP Code*

Website: nextiva.com Phone: _____

Federal ID #: 20-8820926 Dun & Bradstreet #: _____ Date Established: Jan. 29, 2007

Legal Structure:

- Corporation
- Limited Liability Company (Llc.)
- Sole Proprietorship
- Franchise
- Non-Profit
- Other
- Joint Venture
- Partnership

If other, specify structure: _____

Federal Tax Certification:

- W-9 (attach current copy)

Type of Business:

- Construction
- Distributer
- Publication/Broadcaster
- Wholesale
- Consultant
- Manufacturer
- Retailer
- Other
- Courier/Transportation
- Professional Service
- Service Provider

If other, specify type: _____

Are you set up for electronic billing?

Yes

No

Gross Revenue for Previous Fiscal Year:

Under \$100,000

\$100,001-\$500,000

\$500,001-\$750,000

\$750,001-\$1,000,000

\$1,000,001-\$5,000,000

\$5,000,001-\$10,000,000

\$10,000,001-\$50,000,000

\$50,000,001-\$100,000,000

Over \$100,000,000

Number of Employees:

Under 25 employees

26-75 employees

76-150 employees

151-200 employees

201-500 employees

501-1,000 employees

1,001-1,800 employees

1,801-2,500 employees

2,501-5,000 employees

5,001-10,000 employees

10,000-20,000 employees

Over 20,000 employees

Geographic Service Area:

Local

Regional

National

International

If local or regional, specify area(s): _____

Please list primary products/competencies:

Business Representative

Name: _____ Job Title: _____

Email: _____ Phone: _____

Experience & Performance

Please list three references for whom you have worked/provided services.

Contact Name: _____ Phone: _____

Company: _____ Email: _____

Address: _____

Contact Name: _____ Phone: _____

Company: _____ Email: _____

Address: _____

Contact Name: _____ Phone: _____

Company: _____ Email: _____

Address: _____

Does your business conduct the following screening procedures when hiring new employees and/or annually thereafter for each employee? *Please check all that apply.*

- A. Criminal Background Checks Time of hire Annually None
- B. Sex Offender Registry Checks Time of hire Annually None
- C. Drug Testing Time of hire Annually None

Note: YMCA Shared Services, Inc. and our member YMCAs reserve the right to request a background check on any and all sub-contractors used by the party to whom they are contracted to by virtue of this document. This request will be made at the discretion of YMCA Shared Services, Inc. and/or our member YMCAs.

YMCA Shared Services, Inc. reserves the right to request a personal background check on any of the principles of the organization with whom it is contracting.

Proof of Insurance (*Copies of all current documents/certificates must be submitted with this application.*):

General Liability

Workers Compensation

Diversity Information

Please check all that apply. Copies of all current certifications must be submitted with this Application.

Classified/Owned/Certified as:

- Historically Underwritten Business (HUB) Zone**
- Small Business**
- Other**
- None**

If other, specify structure: _____

Company is at least 51% owned, controlled, and actively managed by:

- Minority Person(s)***
- Service Disabled Veteran Owned Small Business**
- Small Disadvantaged Business**
- Woman/Women**
- Other**
- None**

If other, specify structure: _____

*If Minority Person(s) owned, select all that apply:

- African American**
- Asian Indian American**
- Asian Pacific American**
- Hispanic American**
- Native American/Alaskan Native**
- Other**

If other, specify structure: _____

Disclaimer and Signature

I certify that my answers are true and complete to the best of my knowledge. I understand that false or misleading information in this application may result in becoming an unapproved vendor for YMCA Shared Services, Inc.

Signature: _____ Date: _____

Name (Print): _____

Title/Position: _____



YMCA Shared Services, Inc. Purchasing Program Outline

Name of Business/Company/Corporation

Business Representative: *Name, Title*
 Email Address
 Phone Number(s)
 Service Area: States

(List additional business representatives if necessary)

Products & Services:

(List and/or describe all products/inventories/items and/or services that you offer.)

Purchasing Program Information:

(List and/or describe of the pricing parameters, conditions, incentives, etc. that are being offered to members of YMCA Shared Services, Inc. Any product/service exclusions must be specified. Attach any pricing lists that may apply.)

Order Placement:

(Explanation of how orders must be placed, i.e. email, web portal, phone, etc. Please send web portal setup procedure/instructions in a separate document. Specify all information necessary to place an order, including any information needed to apply discounts/purchasing program. Any factors that should be considered when placing an order, i.e. production/lead times, etc.)

Shipping & Delivery Information:

(Explanation of all shipping information needed by you. Any factors regarding delivery that we need to be aware of, i.e. drop vs. direct shipping, additional fees or discounts, etc.)

Billing & Payments:

(Explanation of billing and payment structure members of YMCA Shared Services, Inc. will be responsible for.)

Additional Services, Rebates & Value:

(Include any additional/complimentary values, incentives, etc. that you are able to offer to the members of YMCA Shared Services, Inc.)