

# CONSTRUCTION EQUIPMENT SOURCING/ SELECTION/ PURCHASE WORKSHEET

## FOR USE IN SELF-SERVE PURCHASING UNDER CONSTRUCTION EQUIPMENT PRIMARY CONTRACTS

*Full and complete use of this form and process is mandatory.  
Failure to do so would be in violation of purchasing requirements.*

*Record of this form and process must be kept, and available, as instructed at the end of this form*

Date: \_\_\_\_\_

Requesting District/Division: \_\_\_\_\_

Point of Contact Name: \_\_\_\_\_

Email Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Start Date (when you are seeking to start the purchase process): \_\_\_\_\_

Completion Date (when you need the equipment): \_\_\_\_\_

Quantity Needed, of this Equipment, for this Purchase, at this time: \_\_\_\_\_

*(If you are sourcing distinct types of equipment at the same time (for example, skid steers and excavators, or different 'scale' of similar equipment) fill out a SEPARATE version of this WHOLE Sourcing/Selection worksheet, separately, for each distinct type or 'scale' of equipment)*

This process has three levels, two of which are already in place

The third, a mini-bid process, is covered by this form and process, must be completed by each purchaser, at time of each purchase.

*The uppermost level of this contract portfolio* is multistate collaborative contracts with equipment manufacturers, which Vermont has set up contracts with (but which do not sell direct to end users). These define available makes and models and set prices that are 'ceilings' for each available model:

Case Construction  
Caterpillar  
Clark Equipment (Bobcat)  
John Deere Construction  
New Holland Construction

*The middle level of this contract portfolio* is contracts that the State of Vermont has put in place with dealers, in or near Vermont that sell the one or more of the above makes of equipment:

<b>Contractor Name:</b>	<b>Point of Contact:</b>
<b>CASE Construction</b>	Case -Beauregard Equip. (Several Locations) Jesse Scott <a href="mailto:jscott@beauregardequip.com">jscott@beauregardequip.com</a> 802-893-1555
<b>CAT:</b>	Milton CAT Ray Bernsten <a href="mailto:ray_bernsten@miltoncat.com">ray_bernsten@miltoncat.com</a> 802-434-4228
<b>Clark Equipment Company (Bobcat):</b>	Champlain Valley Equipment Aaron Bourke Sales Derby, Vt 05829 802-766-2400 office 802-673-9902 cellular <a href="mailto:abourke@champlainvalleyequipment.com">abourke@champlainvalleyequipment.com</a>
<b>John Deere (Construction):</b>	John Deere Construction Retail Sales Brooke (Forsberg) DeVol <a href="mailto:ForsbergBrookeL@JohnDeere.com">ForsbergBrookeL@JohnDeere.com</a> Cell 309-207-0431
<b>New Holland (Construction):</b>	Champlain Valley Equipment Aaron Bourke Sales Derby, Vt 05829 802-766-2400 office 802-673-9902 cellular <a href="mailto:abourke@champlainvalleyequipment.com">abourke@champlainvalleyequipment.com</a>

*The final level of the process under this contract portfolio is the “mini-bid” process set out by this form, by which you check, get prices on, and select a specific machine and seller for this specific purchase event.*

*A group of multiples of the same machine may be purchased in this purchase event, but if you separately want to purchase similar equipment later, you must “run” this process each time – price, availability, etc., could change over time.*

**CONFIRMATION OF AVAILABLE FUNDING, AND MANAGEMENT APPROVAL, FOR ANY SPECIFIC PURCHASE IS  
OUTSIDE THE SCOPE OF THIS FORM AND THIS PROCESS  
AND IS YOUR RESPONSIBILITY**

**YOU MUST HAVE THOSE ‘IN HAND’ BEFORE YOU INITIATE THE FOLLOWING PROCESSES DEFINED IN THIS FORM.**

1. **DEFINE THE NEED:** by describing the type of equipment needed, *in as much of a brand-neutral way as you possibly can*, including specific technical or functional characteristics required to do the job (examples might be engine horsepower, gross weight, weight capacity, specific implement or hydraulic connections or compatibility, etc., but these are just examples).

2. **CAREFULLY CHECK ACROSS THE ENTIRE PORTFOLIO OF MANUFACTURERS:** on Contract for Construction Equipment, **[Links to contracts can be found in Appendix A]** to identify \_all\_ makes that have potentially suitable models of equipment meeting the above, and list below; list all that are applicable.  
**CHECK BOTH THE AVAILABLE MODELS AND THE PRICES THAT ARE ESTABLISHED IN THE MULTISTATE LEVEL MASTER CONTRACTS, YOU SHOULD NEVER PAY MORE THAN THE PRICES IN THE MULTISTATE MASTER CONTRACTS** *The Vermont/nearby dealers that hold the mid-level contracts that are part of this contract portfolio must give you pricing that is at least as low as the multistate master level contracts, but you should ask them for (step 4, below) and they may be able to give you, better pricing.*
3. **START BY LISTING ALL MAKES AND MODELS:** that could meet the technical/functional need from Step 1, in the left-hand side of the chart, below.

For this Step 3, ONLY list models, under each brand, which are under contract as part of the Master Contract Portfolio, and that could meet the functional needs that you listed in Step 1.

It is strongly suggested that you list multiple models, within each make, *if* there are multiple models that could suit the intended use under this purchasing event.

Fill in those makes and models in the left-hand side of the table immediately below.

Only in/after Step 4 will you ask for and populate prices and availability dates.

*You should cast as wide a net as you can of makes and models that could suit your technical and functional needs.* If you need more space than is available in this table, print and attach additional copies of the page that contains the table, and make a note explaining that they go with this main table.

<b>CASE Construction</b>			
Model	Multistate master price	Best Price (quoted in Step 4) and name of dealer quoting best price	Delivery Date (from Step 4)
<b>Caterpillar</b>			
Model	Multistate master price	Best Price (quoted in Step 4) and name of dealer quoting best price	Delivery Date (from Step 4)
<b>Clark Equipment (Bobcat)</b>			
Model	Multistate master price	Best Price (quoted in Step 4) and name of dealer quoting best price	Delivery Date (from Step 4)
<b>John Deere Construction</b>			
Model	Multistate master price	Best Price (quoted in Step 4) and name of dealer quoting best price	Delivery Date (from Step 4)
<b>New Holland Construction</b>			
Model	Multistate master price	Best Price (quoted in Step 4) and name of dealer quoting best price	Delivery Date (from Step 4)

If there is a make/ model that would appear at ‘first glance’ to meet your functional capability needs, but that, on further examination, has a limitation or other characteristic making it unsuitable for your needs, explain at the end of this form in Appendix B. In other words, you do not have to get pricing on such models, but you need to identify each such make/model and briefly identify why they were decided to be “out of the running.”

4. Obtain quotes of pricing and availability/ timing: Reach out to each/all retail dealers, based in or near Vermont that hold contracts to sell the equipment. Explain that you are seeking their “best price” under this

contract, in which they must meet or beat the price in the national-level Master contract. Ask them also about delivery time.

You are strongly encouraged to get prices in writing, such as by emails, and attach those to this set of forms. This should be the norm, except if you are under pressing time demands for an urgent situation beyond your prediction or control.

Fill out the “Best Price” and “Delivery Date” in the table above.

5. Summarize which make and model you are choosing to purchase, and why
  - this should very strongly consider price but is not limited to price,
  - timing/ availability can also factor in, if other makes/models cannot be delivered in time for your need
  - You may strike your own balance between price and time as long as you explain why you are opting to go the direction you are to balance price and time.
  - if there are particular features of the make/model that you want to “go with” that other make/model equipment (that you have listed in the table, above) lack, you should describe that here, but if you are using this to override low price, you should describe especially clearly why these features/functions are truly best suited to your intended usage
  
6. Identify the specific equipment make, model, Vermont/Nearby dealer, that you have chosen to carry out the purchase:

Make

Model

Dealer

Price

Quantity

Delivery date

7. CARRYING OUT THE PURCHASE and KEEPING REQUIRED RECORDS

Provide this completed form to your business support personnel who are authorized to issue a Purchase Order.

This completed form should be a part of the Purchase Order provided to the selected dealer.

The Purchase Order, including this form along with and as part of the Purchase Order, must be kept within the Purchasing Agency’s official record-keeping systems for Purchase Orders.

The Purchase Order should be kept for at least as long as the useful life of the purchased equipment. Purchase Orders, for each purchase, including this form along with and as part of each Purchase Order, must be promptly available for examination upon request by the Office of Purchasing & Contracting of the Department of Buildings and General Services.

APPENDIX A

LINKS TO MULTISTATE MASTER EQUIPMENT AND PRICE LISTS

Link to NASPO Portfolio: [Click Here](#)

<b>Contractor Name:</b>	<b>Web Link:</b>
<b>CASE Construction:</b>	<a href="#">NASPO Contract: Click Here</a> <a href="#">Pricing File: Click Here</a>
<b>CAT:</b>	<a href="#">NASPO Contract: Click Here</a> <a href="#">Pricing File: Click Here</a>
<b>Bobcat:</b>	<a href="#">NASPO Contract:Click Here</a> <a href="#">Pricing File: Click Here</a>
<b>John Deere (Construction):</b>	<a href="#">NASPO Contract: Click Here</a> <a href="#">Pricing File: Click Here</a>
<b>New Holland (Construction):</b>	<a href="#">NASPO Contract: Click Here</a> <a href="#">Pricing File: Click Here</a>

APPENDIX B  
LIST AND EXPLANATION OF MODELS CONSIDERED, BUT RULED OUT, AND WHY

APPENDIX C  
ATTACH WRITTEN QUOTES