Contracting with the State of Vermont

Office of Purchasing & Contracting (OPC)
Office of Purchasing & Contracting (OPC)

- We are considered the Central Procurement Office for the State of Vermont.

- The Office of Purchasing and Contracting (OPC), within the Agency of Administration (AoA) carries out the procurement responsibilities assigned to the Commissioner of the Department of Buildings and General Services (BGS) in 29 V.S.A. Chapter 49 and 29 V.S.A, and Chapter 5 § 161, to provide those services and administer the requirements outlined in the statutes and applicable administrative bulletins.
What does that mean?

We are responsible for:

- Making all purchases of goods/products, including fuel, supplies, materials and equipment for all State Agencies and Departments.

- Administering solicitation, procurement and contracting, as set forth in Administrative Bulletin 3.5. As such, OPC has centralized authority for commodity purchases (technology and non-technology), bid administration of technology projects, oversight of some Statewide services (technology and non-technology), vertical construction procurements for the Department of Buildings and General Services (BGS), and procurements by specific State Agencies and Departments over a certain threshold.

- We provide direct services to all Agencies and Departments in State government. These services may be used by political subdivisions of the State as well as schools and State colleges.
Metrics

- The State has approximately 3,100 active contracts of which approximately 1,100 are held by OPC;
- 765 State Sourcing events were publicly posted in Fiscal Year - FY17;
- 115 Sourcing events were publicly posted by municipalities, cities and towns in FY17 at their discretion, but not required;
- % of Vermont Vendors that participate in OPC Bid events:

<table>
<thead>
<tr>
<th>Timeframe - Calendar Year 2017</th>
<th># of Bid Events</th>
<th># of Bidders</th>
<th># of VT Bidders</th>
<th>% of VT Businesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan to March 31, 2017</td>
<td>78</td>
<td>378</td>
<td>211</td>
<td>79%</td>
</tr>
<tr>
<td>April 1 to June 2017</td>
<td>96</td>
<td>437</td>
<td>192</td>
<td>56%</td>
</tr>
<tr>
<td>July 1 to Sept 30, 2017</td>
<td>71</td>
<td>196</td>
<td>104</td>
<td>54%</td>
</tr>
<tr>
<td>October 1 to December 31, 2017</td>
<td>62</td>
<td>175</td>
<td>86</td>
<td>49%</td>
</tr>
<tr>
<td>Year</td>
<td>307</td>
<td>1186</td>
<td>593</td>
<td>50%</td>
</tr>
</tbody>
</table>
Construction Contracts = 96 (06/2018)

- 91% - VT Award (87) $64,562,547.00
- 9% - Non VT Award (9) $3,902,841.00

A & E Contracts = 29 (06/2018)

- 83% - VT Award (24) $11,765,238.00
- 17% - Non VT Award (5) $3,584,586.00
Contracts for Services = 406 (06/2018)

- 79% - VT Award (320) $61,306,490.00
- 21% - Non VT Award (86) $18,949,634.00

Technology Contracts = 155 (06/2018)

- 13% - VT Vendor Awarded (20)
- 22% - No VT Bids (34)
- 37% - Multi-State or GSA (57)
- 17% - Multiple Award includes VT (27)
- 11% - Non VT Award (17)
Commodity Contracts = 381 (06/2018)

- 30% - VT Vendor Awarded (113)
- 29% - No VT Bids (111)
- 11% - Multi-State or GSA (41)
- 21% - Multiple Award includes VT (82)
- 9% - Non VT Award (34)

APRIL 2019
Authority & Purpose

AUTHORITY: Administrative Bulletin 3.5 issued by the Secretary of Administration establishes the general policy and minimum standards for soliciting, awarding, processing, executing and overseeing contracts, as well as managing contract compliance.

PURPOSE: Administrative Bulletin 3.5 applies to the procurement of all goods and services and the required documentation of such procurements, regardless of dollar amount, for all Agencies and Departments, of the State of Vermont government.

- Establishes minimum benchmarks and protocols to ensure the solicitation and awarding of contracts for services are completed with sufficient competition;
- The State’s process is designed to ensure fair and open competition;
- Provides for checks and balances and oversees Agency and Department procurement activities;
- Protects the interest of the State and its taxpayers;
- Ensure all bid solicitations and resulting awards are issued in accordance with Administrative Bulletin 3.5, statute, and executive orders.

How do we do it?

Legislative and Administrative compliance:

- **Commodities**: Awards issued in accordance with Title 29, Chapter 49 § 903; awards are made in the best interest of the State with a number of factors considered. By statute, we are required to document whether Vermont vendors were given consideration.

- **Construction**: Awards issued in accordance with Title 29, Chapter 5 § 161 which states: The contract shall be awarded to one of the three lowest responsible bidders.

- **Services**: No specific statute exists. Awards are issued in the best interest of the State.

- All bid solicitations and resulting awards are issued in accordance with Administrative Bulletin 3.5, Statute and Executive Orders.
What we do

- Oversee the bidding and contracting process to ensure compliance with Administrative Bulletin 3.5 and relevant State statutes and Executive Orders (EO). Title 29 alone provides 13 criteria in which consideration needs to be given; many of the Executive Orders reference environmental requirements in which we need to adhere to.

- Oversee the preparation and issuing of bid proposals, management of the bid process. Includes but not limited to:

  - Commodities needed by any State Agency/Department and various Statewide services.
  - Bid administration for Information Technology (IT) projects.
  - Planning, design, construction, renovation, repair, maintenance, and various services for State buildings.

- Authority: Ensure compliance with Bulletin 3.5 and relevant State statutes and Executive Orders (EO).

- Environmentally Preferable Purchasing Practices: Ensures that policies and procedures, product specifications, and award decisions reflect and support the administration’s commitment to environmental responsibility.
Competitive Bidding & Thresholds

Administrative Bulletin 3.5 states:

Executive Order #3-20:

“The State of Vermont recognizes the important contribution and vital impact that small businesses have on the state’s economy. In this regard, the state prescribes to a free and open bidding process that affords all businesses equal access and opportunity to compete for state contracts for goods and services. The state also recognizes the existence of businesses owned by minorities and women and directs all state agencies and departments to make a good faith effort to encourage these firms to compete for state contracts.”
Competitive Bidding & Thresholds

Types of Competitive Bidding Process:

The time between the initial public notice on the Electronic Bulletin Board (EBB) and the opening of bids must be at least five business days.

- **Standard Bid** – value is greater than $100,000 and process is publicly advertised
- **Simplified Bid** – value is less than $100,000 and a minimum of three quotes are solicited
- **Statewide Contracts** – open for use by all Agencies and Departments
- **Retainer Contracts** – pre-qualified contractors for a specific type of service such as Information Technology (IT) or Construction Services (updated every two years).
For commodity procurements, awards are made under the provisions of 29 V.S.A. §903. Awards are made in the best interest of the State with a number of factors being considered. Those factors include the following:

- Price
- Quality
- Ease of access of supply
- Incidental administrative costs
- Reliability of bidder
- Use of recycled materials
- Minimizing the state’s creation of solid waste
- Generation of pollutants through product use
- Life cycle costs
- Proximity of supplier
- Costs of transportation
- VT’s economy (job creation/retention)
- Use of railroads and resultant revenues
RF(x)

- **Request for Information (RFI)** - Generally used to obtain information, such as capabilities, practices, systems, licenses, etc. to address a particular need to help develop an effective RFP.

- **Request for Comment (RFC)** – A process whereby the State issues a future/proposed RFP in order to solicit input about all or a portion of the RFP structure, language, methodology, etc.

- **Request for Proposal (RFP)** - Usually used for recurring requirements or very complex purchases or agreements.

- **Request for Quote (RFQ)** – Generally used for a one-time bid and buy requirement.
Minority & Women Owned Business Enterprises (M/WBE)

It is the policy of the State of Vermont that Minority / Women Owned Business Enterprises (M/WBE) shall have the maximum opportunity to participate in the performance of contracts financed with State funds. All Bidders are encouraged to contact M/WBE's in an effort to recruit them to submit proposals for the work or portions thereof. BGS provides for self certification of M/WBE’s that we make available on our website.

The following information can be found at: http://bgs.vermont.gov/facilities/forms/minority-women

- 2018 M/WBE Directory
- Governor's Executive Order #15-91
- M/WBE form
Where do I find Publicly Posted Bid Information?

Requests for Proposal (RFP) and/or Requests for Quote (RFQ) issued by OPC are posted online as follows:

- The Notice of Solicitation is posted on the EBB at http://www.vermontbidsystem.com/. The notice contains a brief summary of the RFP, deadlines for submission of bids, and a point of contact for the RFP. To download the full documentation visit OPC’s website (listed below).

- The RFP or RFQ is posted on the OPC’s website under Bid Opportunities at http://www.bgs.state.vt.us/pca/bids/bids.php.

- Construction RFPs are posted at: http://www.blueprintsetc.com.
How do I compete for a State Contract?

The primary means of obtaining a State contract is to successfully compete for an award by responding to a RFP.

We recommend:

- Reading the documents carefully to understand the State’s requirements.
- Take advantage of question and answer opportunities.
- Communicate only with the point of contact for the RFP, typically only in writing.
- Monitor the RFP posting while it is open/active to ensure you receive and understand any addendums or other changes made to the event up to the due date.
- Review the terms and conditions, as they will be part of the final contract with a successful bidder.
Communications during the bid process

Restrictions apply given the present and future state of a given RF(x).

- Open – still in process
- Fully executed contract

Public Records Requests

- Suspended requirement
- Completely Closed
- Potential to re-do
What YOU can do?

SEIZED BID
REQUEST FOR PROPOSAL

PROJECT TITLE

ISSUE DATE:

DATE

BIDDERS' CONFERENCE:

DATE and TIME

QUESTIONS DUE BY:

DATE

RFP RESPONSES DUE BY:

DATE and TIME

PLEASE BE ADVISED THAT ALL NOTIFICATIONS, RELEASES, AND AMENDMENTS ASSOCIATED WITH THIS RFP WILL BE POSTED AT:

http://www.bgs.state.vt.us/pca/bids/bids.php

THE STATE WILL MAKE NO ATTEMPT TO CONTACT INTERESTED PARTIES WITH UPDATED INFORMATION. IT IS THE RESPONSIBILITY OF EACH BIDDER TO PERIODICALLY CHECK THE ABOVE WEBPAGE FOR ANY AND ALL NOTIFICATIONS, RELEASES AND AMENDMENTS ASSOCIATED WITH THIS RFP.

STATE CONTACT:

NAME, TITLE

(802) ####-####

E-MAIL:

E-MAIL@vermont.gov

FAX:

(802) ####-####

AGENCY/DEPT

100 State Street [Alaska] 802-828-2011
Montpelier VT 05609-2001 [Fax] 802-828-2022

http://bgs.vermont.gov/purchasing

Important Dates

Where Bids are posted

Point of Contact
What YOU can do?

- Monitor the BGS website for bid solicitations, changes, addendums, etc. [http://www.bgs.state.vt.us/pca/bids/bids.php](http://www.bgs.state.vt.us/pca/bids/bids.php)

- Familiarize yourself with existing contracts that correspond to your business. [https://bgs.vermont.gov/purchasingcontracting/contract-info](https://bgs.vermont.gov/purchasingcontracting/contract-info)
  - What products/services are they comprised of?
  - What are the Terms of Service?
  - When do they expire?
  - Are there renewal options? etc.
What we purchase...

On a practical level, it would be cumbersome and inefficient to go through a full competitive bid process each and every time a department needs to purchase a box of pens, one box of replacement light bulbs, or one truckload of road salt. For this reason (and others), OPC has numerous contracts with commodity vendors that are “bid” globally.

Agencies and Departments in need of a particular commodity (like the light bulb example above) go to the appropriate contract to purchase the particular supply required. There are numerous contracts in place to meet the general needs of the State. These contracts allow all Agencies and Departments to purchase everything from office supplies, maintenance services, to road salt. We basically purchase anything the State may need to maintain operations.

We also engage in individual “bid-and-buy” transactions where a department has a one-time need and it is not necessary to put a statewide mandatory contract in place.
Retainer Contracts:

➢ Construction Services & Professional Consulting Services:
http://bgs.vermont.gov/content/construction-services-and-professional-consulting-retainer-contracts

Current categories in place include:

- Asphalt, Paving, Sealing and Striping
- Boiler & Furnace Service
- Carpentry
- Floor Covering & Installation
- Concrete, Masonry and Stone
- DDC & Light Controls
- Electrical & Fire Alarms
- Fencing
- Flooring
- General Contracting
- General Environmental Services
- HVAC Services
- HVAC & Plumbing
- Janitorial Services
- Landscape, Hardscape & Tree Services
- Metal Fabrication
- Painting
- Pesticide Application
- Project Management Services
- Roofing
- Sanitary Services
- Site & Earthwork
- Window & Door
- Architecture Firms
- Engineering Firms
- Fire Alarm, Sprinkler & Fire Suppression
Retainer Contracts:

Information Technology (IT):
http://bgs.vermont.gov/purchasing%20and%20contracting/current%20contracts/information-technology

Current categories in place include:

- Business Analyst & Project Management Services
- Infrastructure (Physical/Virtual) Support Services
- SharePoint Support, Services and Development
- Enterprise GIS Services
- Strategic Planning Assistance
- Independent Review
- Enterprise Content Management
- DBA/SQLDBA/Relational Database Support
- Agile Development Services
- PeopleSoft Application / System Administration Support
- Network Consulting and LAN/WLAN Support Services
- Hardware/Software Application Security Services
Do I have to register with the State?

While not required for bidding, all businesses must be registered with the Secretary of State in order to do business in the State of Vermont.  
http://www.sec.state.vt.us/.
How do I bid? What do I need to have?

- Your company’s bid proposal must contain a response to all requirements including all required forms/certifications,
  - a completed price schedule as outlined in the RFP (where applicable),
  - a signed Certificate of Compliance (found within the RFP).
- An RFP may contain one or more additional forms that gathers information particular to that bid event.
- Make sure your company’s bid proposal responds to all mandatory requirements.
- As well, your company’s bid proposal must arrive prior to the time and date at the bid location as stated in the RFP.
- Late bid proposals will not be considered, and proposals will be returned unopened.
My company submitted a bid proposal. Now what happens?

- All bid proposals are opened at the date and time as stated in the RFP.
- At the stated time of the bid opening (as per the RFP schedule), the bidder’s names are read aloud.
- A bid tabulation sheet is created recording all the bid proposals.
- Bid proposals are then reviewed and evaluated by the State in accordance with requirements identified in the RFP.
- During the evaluation period, the State does not provide interim status updates or information. This is only available once there is a fully executed and awarded contract.
- Bid results are a public record however, the bid results are exempt from disclosure to the public until the award has been made and the contract is executed.
Awarding a State Contract:

After evaluations of the bid proposals, the selected bidder receives a Notification of Award for a State contract from OPC. A Certificate of Insurance (COI) is required, and other documents may be required before the contract is issued.

After I get a State Contract:

The awarded Vendor is only permitted to sell the products/goods and/or services awarded as stated in the contract. Awarded Vendors are encouraged to build a business rapport with the various Agencies and Departments that use your product(s)/goods and/or service(s).
Sample Certificate of Insurance (COI)
## Sample Certificate of Insurance (COI)

<table>
<thead>
<tr>
<th>COVERAGES</th>
<th>CERTIFICATE NUMBER:</th>
<th>REVISION NUMBER:</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>X</td>
<td>COMMERCIAL GENERAL LIABILITY</td>
<td></td>
</tr>
<tr>
<td>X</td>
<td>CLAIMS-MADE</td>
<td>X</td>
</tr>
<tr>
<td>X</td>
<td>POLICY</td>
<td>PROJ.</td>
</tr>
</tbody>
</table>

**GENL. AGGREGATE LIMIT APPLIES PER:**

- **X** POLICY
- **X** PROJECT
- **X** LOCATION

**OTHER:**

<table>
<thead>
<tr>
<th>INSR. LTR</th>
<th>TYPE OF INSURANCE</th>
<th>ADDL. SUBR. (INDO)</th>
<th>POLICY NUMBER</th>
<th>POLICY EFF. (MM/DD/YYYY)</th>
<th>POLICY EXP. (MM/DD/YYYY)</th>
<th>LIMITS</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>X</td>
<td></td>
<td>X</td>
<td>06/13/2018</td>
<td>06/13/2019</td>
<td>EACH OCCURRENCE DAMAGE TO RENTED PREMISES (EA occurrence) $1,000,000</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>MED EXP. (Any one person) $50,000</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>PERSONAL &amp; ADV INJURY $5,000</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>GENERAL AGGREGATE $1,000,000</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>PRODUCTS - COM/M&amp;OP AGG $2,000,000</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>CONTRACTORS POLL $1,000,000</td>
</tr>
</tbody>
</table>

**B** AUTOMOBILE LIABILITY

<table>
<thead>
<tr>
<th>ANY AUTO</th>
<th>OWNED AUTOS ONLY</th>
<th>SCHEDULED AUTOS</th>
<th>NON-OWNED AUTOS ONLY</th>
</tr>
</thead>
<tbody>
<tr>
<td>X</td>
<td></td>
<td>X</td>
<td>X</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>UMBRELLA LIABILITY</th>
<th>EXCESS LIABILITY</th>
<th>DED</th>
<th>RETENTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>OCCUR</td>
<td>CLAIMS-MADE</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| W/O               | N/A               |     |           |
| WORKERS' COMPENSATION AND EMPLOYERS' LIABILITY | ANY PROPRIETORS/EARNERS/EXECUTIVE OFFICER/OWNER EXCLUDED | (Mandatory in IN) |
|                 | DEEP                  |     |           |

<table>
<thead>
<tr>
<th>INSR. LTR</th>
<th>TYPE OF INSURANCE</th>
<th>ADDL. SUBR. (INDO)</th>
<th>POLICY NUMBER</th>
<th>POLICY EFF. (MM/DD/YYYY)</th>
<th>POLICY EXP. (MM/DD/YYYY)</th>
<th>LIMITS</th>
</tr>
</thead>
<tbody>
<tr>
<td>A</td>
<td>X</td>
<td></td>
<td>X</td>
<td>06/13/2018</td>
<td>06/13/2019</td>
<td>EACH OCCURRENCE DAMAGE TO RENTED PREMISES (EA occurrence) $1,000,000</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>MED EXP. (Any one person) $50,000</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>PERSONAL &amp; ADV INJURY $5,000</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>GENERAL AGGREGATE $1,000,000</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>PRODUCTS - COM/M&amp;OP AGG $2,000,000</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>CONTRACTORS POLL $1,000,000</td>
</tr>
</tbody>
</table>

**DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)**

Re: Contract

Additional Insured status applies per the terms and conditions of attached
Who can use State contracts?

- State contracts may be available for use by a single State Agency and/or all State Agencies and Departments.

- Cities and Towns, Schools, Political Subdivisions, and institutions of higher education of the State of Vermont may also utilize these contracts, if the contractor has agreed to offer those terms and conditions.


- List of Contracts that have been Added or Amended (last 30 days): https://bgs.vermont.gov/sites/bgs/files/OPC%20Added%20or%20Updated%20Contracts%20Nov%202018.pdf
Meet the Team

Christopher Cole  
BGS Commissioner  
802.828.3519  
Chris.Cole@vermont.gov

Deborah Damore  
OPC Director  
802.828.2211  
Deborah.Damore@vermont.gov

Rebecca White  
Vermont Certified Public Manager/  
Risk Management Director of Operations  
802.828-1010  
Rebecca.White@vermont.gov

Brian Berini  
State Commodities Procurement Administrator  
802.828.2217  
Brian.Berini@vermont.gov

Deb LaRose  
State Purchasing Agent  
802.828.4635  
Deborah.Larose@vermont.gov

Michele Snyder  
State Assistant Purchasing Agent  
802.828.5684  
Michele.Snyder@vermont.gov

Linda Wortman  
State Purchasing Agent  
802.828.4658  
Linda.Wortman@vermont.gov

Erin Collier  
State Senior Purchasing Agent  
802.828.2215  
Erin.Collier@vermont.gov

Sharon Welch  
State Assistant Purchasing Agent  
802.828.5685  
Sharon.Welch@vermont.gov

Stephen Fazekas  
Technology Procurement Administrator  
802.828.2210  
Stephen.Fazekas@vermont.gov

Bill Vivian  
State Purchasing Agent  
802.828.4681  
Bill.Vivian@vermont.gov

Lucie Fortier  
Procedures Specialist  
802.828.1942  
Lucie.Fortier@vermont.gov

OPC General:  
802.828.2211  
Send all inquiries to:  
SOV.OPC@Vermont.gov

APRIL 2019
Resources:

- Vermont Secretary of State: [http://www.sec.state.vt.us/corporationsbusiness-services.aspx](http://www.sec.state.vt.us/corporationsbusiness-services.aspx)
- OPC’s Current Bid Listings: [http://bgs.vermont.gov/purchasing/bids](http://bgs.vermont.gov/purchasing/bids)
- Bidding & Contracting Forms: [http://bgs.vermont.gov/purchasing-contracting/forms](http://bgs.vermont.gov/purchasing-contracting/forms)
- Publications: [http://bgs.vermont.gov/purchasing-contracting/publications](http://bgs.vermont.gov/purchasing-contracting/publications)
- Print Procurement: [http://bgs.vermont.gov/purchasing-contractingprint-procurement](http://bgs.vermont.gov/purchasing-contractingprint-procurement)
- Agency of Commerce & Community Development: [https://accd.vermont.gov/economic-development](https://accd.vermont.gov/economic-development)
Some Examples of what the State buys
OPC Newsletters:

OPC publishes two newsletters entitled “Let’s Connect” and “Buyer’s Buzz News” providing subscribers with up-to-date information about the contracts, bid events and contracting activities in the State of Vermont.

https://bgs.vermont.gov/purchasing-contracting/publications/newsletter

If you would like to become a subscriber, please send us an email to:

SOV.OPC@vermont.gov
Thank you!

We look forward to doing business with you!

Office of Purchasing & Contracting (OPC)

SOV.OPC@Vermont.gov