



PURCHASING UPDATE

February 2017

February 20, 2017

To: **Department Purchasing, Budget, and Accounting Officers**

From: **Kent D. Beers, Director**
Division of Purchasing and General Services

Subject: **Fiscal Year End Procedures—Requisitions/Solicitations**

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With the approaching fiscal year end, many state agencies are ready to make purchasing decisions that they may have prolonged until they are certain funding is available. We prefer to bid early, even though you may not be certain funding is available. It is easier for us to cancel a few bids than to rush requisitions through during the last few weeks of the year.

Our experience indicates that our workload is extremely heavy this time of year. The number of requisitions received by the Division of Purchasing doubles and often triples. This increased workload requires additional planning by you and other state agencies. The following procedures are designed to allow the Division of Purchasing to process both old and new year purchases in an efficient manner. Please make every effort to adhere to these procedures.

- Submit all current fiscal year requisitions to the Division of Purchasing by April 14, 2017. These requisitions are first priority.
- Requisitions received after April 15th are second priority. The Division of Purchasing and General Services cannot guarantee that the procurement process will be completed and delivery made by fiscal year end.
- Order releases on State contracts (PD, PA, MA, MC & AR) to be paid from "FY2017" funds need to be placed timely enough to ensure delivery by the end of business on June 30, 2017. Deliveries received after that date become obligations of "FY2018" funds.

Please make a special effort to make year-end procurement orderly. As always, your cooperation is appreciated.

AGENCY CONTRACTS— FISCAL YEAR END PLANNING

It is time to plan for contracts that will be processed this fiscal year. The Division of Purchasing receives an increased volume of RQS & RQM, contracts and amendments from mid-April through June each year. Because of the increased volume but not an increase in employees, the processing time increases during busy year end. We encourage agencies plan ahead so that agency contracts will be processed timely.

Please note the following information:

1. Send your contracts and amendments for the current fiscal year as early as possible. After contracts and amendments are signed by the contractor and the agency, they are sent to the Division of Purchasing to review and sign.
2. Please be aware of the following deadlines:
 - A. Contracts and amendments should be received by the Division of Purchasing by June 10, in order to be processed during this fiscal year. Sending contracts in by May 1 is a better choice. The contracts/ amendments that arrive by June 10 are first priority.
 - B. Contracts and amendments received after June 10 are second priority. The Division of Purchasing cannot guarantee that contracts received after June 10 will be completed by fiscal year end.
3. Most agency contracts and amendments route through four employees' workloads in the Division of Purchasing before being sent to State Finance. The contracts are processed as follows:
 - A. The Purchasing Technician enters contracts and amendments into the Contract Tracking System when the process begins.
 - B. A Purchasing Agent reviews the contracts for procurement issues.
 - C. A Contract Analyst completes a legal review.
 - D. Our Director or an Assistant Director does a final review for Purchasing and signs the contracts, or for lower dollar contracts, the contract is returned to the Purchasing Agent for signature.
 - E. The Purchasing Technician enters the contract/amendment into FINET.
 - F. The contract/amendment is given to Sheri Witucki, Contract Analyst for the Division of Finance, who reviews and signs stamps the contracts.
4. If the contracts or amendments have any problems or missing information, they are put on "hold" until the issues are resolved. It can take up to two weeks or longer to resolve issues on contracts.
5. For any purchases to be made this fiscal year, the contract or amendment must be fully approved, signed, and entered into FINET. Also, the purchases or services must be to be received before June 30 to qualify for purchase with FY17 year money.

Plan ahead and process your contracts and amendments early so that the fiscal year end will run smoothly for your agency and for the Division of Purchasing.

SPRING PROCUREMENT EDUCATION PARTNERSHIP SEMINAR

The 2017 *Spring Procurement Education Partnership Seminar* (PEP Seminar) will be held Thursday, March 16 from 9 AM—4 PM. This seminar was announced in the January newsletter; if you are unsure if you have registered for this training, please email Tara Eutsler (teutsler@utah.gov) rather than registering again.

Registration ends on March 10.

Click the link to register for [on location attendance](#) for the seminar.

Only sessions held in the auditorium will be broadcast. For this seminar, the two breakout sessions that will be webcast are the “Approved Vendor Lists—Creation & Use” and “Best Practices of Award of a Contract Without Engaging in a Standard Procurement Process” Click to register for [webinar attendance](#). Information and links for the seminar will be sent out by March 14.

A week prior to the seminar, you will receive an event reminder. If you cannot attend, send an email immediately to teutsler@utah.gov so that your meal can be canceled and save the State the expense. If you do not receive an email by March 14, a step was missed during your registration and your registration was not received.

Procurement Code and Administrative Rule Update

This training is to outline changes which are occurring to the Procurement Code and the Administrative Rule.

Contract Administration & Introduction of Forms

This training will review the common areas of contract administration that are often overlooked and the issues that can arise when the areas are overlooked. It will also review forms that the Division of Purchasing uses to help with contract administration.

Fraud Training

Based on UCA 63G-6a Part 24 Fraud, this training seeks to assist entities in avoid occurrences of fraud.

Break Out Session #1 Choices:

Approved Vendor Lists--Creation and Use

The training will cover the process of creating approved vendor lists using requests for statements of qualifications, drafting the contracting documents, and how to use approved vendor lists, both as a buyer and assisting vendors and others.

Managed Service Provider Cooperative Contract – IT Professional Services

The training will outline the process for using the IT Professional Services component of the Managed Service Provider Cooperative Contract with Knowledge Services (IT2462), discuss the role Knowledge Services plays in the vendor selection process, and explain how this contract adds value to agencies.

Small Purchase of Professional Service Providers & Consultants—R33-5-108

The training will provide direction for procuring services using the R33-5-108 Small Purchase of Professional Service Providers and Consultants. It will discuss what procurements qualify and the process used by State Purchasing.

Break Out Session #2 Choices:

Best Practices of Award of a Contract w/o Engaging in a Standard Procurement Process

The training will cover best practices when awarding a contract without engaging in a standard procurement process. The discussion will include sole sources, transition costs, and other circumstances that may make awarding a contract through a standard procurement process impractical.

Best Practices for Services Contracts

This session will focus on elements of a service solicitation/contract that may improve the service performance and simplify contract administration. These solicitation/contract elements may include detailed service description, identification of service exclusions, total project life cycle costs/budget, quality assurance thresholds, and performance evaluation requirements.

SciQuest Basics

This training will give direction in setting up your SciQuest account and illustrate creating a basic solicitation. We will also discuss the basics of how the vendor interacts with SciQuest.



DIVISION OF
PURCHASING & GENERAL
SERVICES

PROCUREMENT EDUCATION PARTNERSHIP SEMINAR

HOSTED BY THE STATE OF UTAH, DIVISION OF PURCHASING AND NATIONAL ASSOCIATION OF STATE PURCHASING OFFICIALS

Time	Topic	Presenter
9:00 - 9:15	Welcome	Chris Hughes
9:15 – 9:30	Introduction of Purchasing’s Agency Contacts	Jennifer Salts
9:30 – 10:00	Introduction to Purchasing’s New Website / Highlight of State Cooperative Contracts	Windy Aphayrath, John Palmer, Jennifer Salts
10:00 – 10:45	Procurement Code and Administrative Rule Update	Kent Beers
10:45 – 11:00	Break	
11:00 – 12:00	Contract Administration & Introduction of Forms	Chris Hughes
12:00 – 1:00		
Break Out Session 1	Approved Vendor Lists — Creation & Use	Zac Christensen
	Managed Service Provider Cooperative Contract – IT Professional Services	Fay Tan/ Solomon Kingston
	Small Purchase of Professional Services—R33-5-108	Jennifer Salts
1:00 – 1:50		
1:50 – 2:00	Break – Move to next session	
Break Out Session 2	Best Practices of Award of a Contract Without Engaging in a Standard Procurement Process	Spencer Hall
	Best Practices for Service Contracts — Tips for Developing Service Procurements and Contracts	Terri O’Toole
2:00 – 2:50	SciQuest Training	Windy Aphayrath
2:50 – 3:00	Break – Return to Auditorium	
3:00 – 4:00	Fraud Training	Kent Beers

DATE: Thursday, March 16, 2017
 TIME: 9 AM – 4 PM (Sign-In from 8:30-9:00 AM)
 LOCATION: State Office Building; 1st floor Auditorium
 450 North State Street, Salt Lake City, Utah

Registration closes March 10, 2017 or when capacity is reached

On Location Attendance Registration ►►► [On Location Registration Link](#)
 Webinar Registration ►►► [Webinar Registration Link](#)

NOTE: This training qualifies as “instructor-led” procurement training for the CPPB & CPPO certification requirements

**Cooperative Contract:
HVAC and Refrigerated Kitchen: Installation,
Repairs, Upgrades, Service, and Maintenance**

The State of Utah Announces the new Contracts for HVAC and Refrigerated Kitchen: Installation, Repairs, Upgrades, Service, and Maintenance. This is a "Best Value" State Cooperative Contract.

This is a multiple award solicitation by region.

Prior to ordering, the buying entity must order from the Primary vendor awarded in region in which the work will be completed. If the Primary is contacted and is unable to perform work on the specific equipment, the buying entity may move to Secondary vendor. The buying entity should be aware that there are different Primary awards, depending on if the need is for HVAC services or Refrigerated Kitchen services.

Hourly rates have been established as well as price mark-up on parts. These rates are in the contract summary sheets.

If you have questions about these contracts, please contact Cody Nelson at codynelson@utah.gov or call 801-538- 3141.



HVAC Services			
Region 1	Primary Award	American Mechanical System Services	MA2606
	Secondary Award	Mountain Valley Mechanical	MA2607
	Tertiary Award	Comfort Systems USA Intermountain	MA2608
Region 2	Primary Award	Comfort Systems USA Intermountain	MA2608
	Secondary Award	The Trane Company	MA2609
Region 3	Primary Award	Comfort Systems USA Intermountain	MA2608
	Secondary Award	American Mechanical Systems Service	MA2606
	Tertiary Award	The Trane Company	MA2609
Region 4	Primary Award	Comfort Systems USA Intermountain	MA2608
	Secondary Award	The Trane Company	MA2609
Region 5	Primary Award	Comfort Systems USA Intermountain	MA2608
	Secondary Award	The Trane Company MA2609	MA2609
Refrigerated Kitchen Equipment and Service			
Region 1	Primary Award	Comfort Systems USA Intermountain	MA2608
	Secondary Award	Mechanical Service and Systems	MA2610
Region 2-5	Primary Award	Comfort Systems USA Intermountain	MA2608

STATE OF UTAH

Division of Purchasing
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Phone: 801-538-3026

**We're on
the Web !**

[purchasing .utah.gov](http://purchasing.utah.gov)

UPCOMING PEP SEMINARS

Mar 16, 2017

Jun 15, 2017

Note: PEP Seminars are now be held on Thursdays.

NEW FACES AND FAREWELLS

State Purchasing welcomes two new employees—Kaitee Hall and Cherilyn Hess—who will be with our agency contract, PO, State cooperative processes.

Cherilyn graduated from the University of Utah with BA in History. She holds a minor in Business from SLCC. She has been married 5 years to an amazing man, Trevor, and has a beautiful 14 month old son, Elliott. Cherilyn previously worked at WesTech Engineering as an Administrative Assistant for almost 6 years.

Kaitee received her Associates Degree in General Studies from Salt Lake Community College this past

semester and is preparing to further her education at the University of Utah in the fall. Prior to joining State Purchasing, Kaitee Hall worked in banking industry as a customer service representative.

State Purchasing says farewell to Brad Cummings and Spencer Hall. Brad took a position as Purchasing Manager with the Board of Education and Spencer moved to the Bureau of Contracts Management with the Department of Human Services as the Assistant Bureau Director. We wish both of them the best in their new positions.

HOW TO RECEIVE THE PURCHASING UPDATE NEWSLETTER

Did you receive this newsletter from a co-worker? Do you want to receive the Purchasing Update directly? Please follow the appropriate steps below.

(A) Individuals who have a State Google email account:

Step 1: Enter into GROUPS in the State Google email account

Step 2: In the new window's search field, type PURCHASING NEWSLETTER

Step 3: Google will list the "Purchasing Newsletter" as a group. Select the group.

Step 4: Click JOIN GROUP.

Step 5: In the new window, click JOIN GROUP. The administrator will be informed of your request and approve it.

(B) Individuals that do not have a State Google email account:

Please send an email to Tara Eutsler, teutsler@utah.gov.

NEW STATE OF UTAH “BEST VALUE” COOPERATIVE CONTRACTS

TITLE	CONTRACT	VENDOR	DATES	ADDITIONAL INFORMATION
Energy Performance Contract Third Party Reviewing Services	AV2579	The Brendle Group	1/1/2017—11/30/2021	Multiple award AVL. See contract summary for procurement information and the qualified categories for each vendor
	AV2580	Celtic Energy, Inc.	1/1/2017—11/30/2021	
	AV2581	Engineering Economics	1/1/2017—11/30/2021	
	AV2582	kW Engineering, Inc.	1/1/2017—11/30/2021	
	AV2583			
	AV2584	Steven Winter Associates	1/1/2017—11/30/2021	
	AV2585	Trident Energy Services, Inc.	1/1/2017—11/30/2021	
	AV2586	Vibrantcy, LLC	1/1/2017—11/30/2021	
Fertilizer and Herbicides	AV2602	Crop Production Services	2/1/2017—1/31/2022	
	AV2603	Greensource, LLC	2/1/2017—1/31/2022	
	AV2604			
	AV2605	SiteOne Landscape Supply	2/1/2017—1/31/2022	

BEFORE searching the State of Utah Best Value Cooperative Contract website at <http://purchasing.utah.gov/statecontractdirectory/> click the radial button to let the website know that you are searching the cooperative contracts.



*The brief information in this newsletter is intended to highlight new contracts and contract changes. Always read the entire contract information sheet prior to making a purchasing decision.

NEW STATE OF UTAH “BEST VALUE” COOPERATIVE CONTRACTS

TITLE	CONTRACT	VENDOR	DATES	ADDITIONAL INFORMATION
Recycling Services	AV2595	Ace Disposal	1/25/2017– 1/24/2022	Multiple award AVL. See contract summary for secondary procurement requirements.
	AV2596	Blue Sky Services	1/25/2017– 1/24/2022	
	AV2597	Momentum Recycling	1/25/2017– 1/24/2022	
Waste/Refuse Truck Sales	AV2598	Kenworth Sales Company	1/25/2017– 1/24/2022	Multiple award AVL. See contract summary for secondary procurement requirements.
	AV2599	Legacy Equipment Company	1/25/2017– 1/24/2022	
	AV2600	McNeilus Companies, Inc.	1/25/2017– 1/24/2022	
	AV2601	Semi Service Inc.	1/25/2017– 1/24/2022	
Second Market Foods, Shelf Stable/Frozen	MA184	Remit: Good Source	01/03/2017– 01/02/2022	Single Award Contract
Cloud Solutions	AR2472	Carahsoft Technology Corp	10/14/2016– 09/15/2026	Multiple Award contract.
GTMS Contract Compliance and Cost Recovery Services	PD2611	GMTMS	02/01/2017– 07/31/2018	
HVAC and Refrigerated kitchen install, Repair, upgrade, service, and maintenance	MA2606	American Mechanical Systems Service, LLC	03/01/2017– 02/28/2021	This is the primary contract for region #1—HVAC Services
	MA2607	Mountain Valley Mechanical, Inc		This is the secondary contract for region #1—HVAC Services
	MA2608	Comfort Systems		
	MA2610	Mechanical Services and Systems		This is the secondary contract for region #1—Refrigerated Kitchen Equipment & Services
Rental Equipment without an Operator	AV2591	Herc Rentals, Inc	2/1/2017– 1/31/2021	

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NEW STATE OF UTAH “BEST VALUE” COOPERATIVE CONTRACTS

TITLE	CONTRACT	VENDOR	DATES	ADDITIONAL INFORMATION
Video Production and Editing Services	AV2554	Kineto Pictures, Inc.	11/1/2016—10/31/2021	Multiple award AVL. See contract summary for more information
Video Production and Editing Services	AV2556	Override Film	11/1/2016—10/31/2021	Multiple award AVL. See contract summary for more information
Honda	AV2577	Stockton #12 Automotive	1/6/2017—10/5/2021	Multiple award AVL. See contract summary for more information
Rental Equipment without an Operator	AV2590	Trench Shoring Services of Utah, Inc.	2/1/2017—1/31/2021	Multiple award AVL. See contract summary for more information
Rental Equipment without an Operator	AV2592	Rush Truck Leasing, Inc.	2/1/2017—1/31/2021	Multiple award AVL. See contract summary for more information
Energy Metering System	AR2589	Lucid Design Group, Inc.	2/1/2017—1/31/2024	State-level executive branch agencies must contact DTS to make purchases from this contract.
Scientific and Laboratory Equipment & Supplies	MA412	VWR International INC	2/1/2017—4/1/2019	Multiple award. Please view other contracts before making a purchasing decision.
Fresh Eggs	PD686	Rocky Mountain Eggs	1/25/2017—1/24/2022	
Disposable Diapers for Infants and Toddlers	PD2574	Health-Care Equipment & Parts Co. Inc.	1/30/2017—1/29/2022	
Fire Extinguishers (PRIMARY)	MA1950	Interstate Fire Sales and Services, LLC dba: State Fire DC Specialties	1/1/2017—12/31/2021	Multiple award contract that when placing orders, an eligible user must first order from the primary contract and, if the primary contract cannot fulfill the order, then the eligible user will use the secondary contract.
Fire Extinguishers (SECONDARY)	Ma2587	Delta Fire Systems, Inc	1/1/2017—12/31/2021	
Parks & Recreation Equipment and Related Services (NASPO ValuePoint)	MA2570	Play and park Structures	1/1/2017—12/1/2017	Multiple award contract
Cloud Solution	AR2505	Quest Media & Supplies, Inc	10/14/2016—9/15/2026	This is a multiple award contract. Please review all awarded contracts specific to your procurement needs and compare services and pricing before making your final purchase.

*The brief information in this newsletter is intended to highlight new contracts and contract changes. Always read the entire contract information sheet prior to making a purchasing decision.

EXTENDED STATE OF UTAH “BEST VALUE COOPERATIVE CONTRACTS

TITLE	CONTRACT	VENDOR	DATES	ADDITIONAL INFORMATION
Breast Pumps, Kits, Adaptors and Battery Packs (WSCA)	MA322	MEDELA, Inc	Thru 06/30/2017	
Breast Pumps, Kits, Adaptors and Battery Packs (WSCA)	MA036	Ameda, Inc	Thru 06/30/2017	
Industrial Equipment & Supplies:	MA043	Fastenal	Thru 6/30/2017	

EXPIRED OR CANCELED STATE OF UTAH “BEST VALUE COOPERATIVE CONTRACTS

TITLE	CONTRACT	VENDOR	END DATE	ADDITIONAL INFORMATION

Not all expired or canceled contracts make it to this list. Always check the contract online to determine if it is still active.

State of Utah “Best Value” Cooperative Contracts Search Engine location:

<http://purchasing.utah.gov/statecontractdirectory.html>