



PURCHASING UPDATE

April 2017

SAVE THESE 2017 DATES

PEP SEMINARS

JUNE 15, 2017

SEPTEMBER 14

DECEMBER 7

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PRE-BID CONFERENCES AND SITE VISITS— CLARIFYING THE VISION

By Amy Gerrard

Pre-bid conferences and site visits are often perceived by many in the procurement process as “time-killers.” The feed back is that it is too time consuming to conduct a site visit or pre-bid conference; that the time could be better spent on other areas of the procurement process. However, for some procurements, pre-bid conferences and/or site visits can play a crucial role in sharing information with vendors and gaining insight in return which cannot be obtained through other means.

Under [Administrative Rules R33-6-103](#) and [R33-7-201](#), “pre-bid conferences and site visits *may* be held to explain the procurement requirements” but must be held in accordance to the Rules provided. Subsection R33-6-103 continues by providing various flexible options on how a pre-bid conference or site visit may be conducted, what information must be included in the solicitation, and what records of the pre-bid conference or site visit must be maintained. More importantly, the subsection includes what specific behaviors/conduct would disqualify a vendor from participating in the procurement process.

“All pre-bid conferences and site visits must be attended by an authorized representative of the person or vendor submitting the bid...” (*R33-6-103(1)(e)*). Failure to attend a mandatory pre-bid conference or site visit shall result in the disqualification of any bidder that does not have an authorized representative attending the ENTIRE duration of the mandatory pre-conference bid or site

visit. (*R33-6-103 (1)(f) and (g)*).

There is often miscommunication and confusion regarding the requirement that the bidder attend the pre-bid conference or site visit in its entirety.

Miscommunication and confusion can be avoided by providing a clear and concise solicitation which includes the following information:

1. Date, time and local of the mandatory pre-bid conference and site visit;
2. Only ONE pre-bid conference or site visit will be offered;
3. An authorized representative from each participating agency, office, firm, company, etc. must be in attendance;
4. Participants must be on-time and remain for the entire pre-bid conference or site visit;
5. Discussions amongst authorized representatives after the pre-bid conference or site visit has ended are strongly discouraged; and
6. Failure to send an authorized representative, or to participate for the entire duration of the pre-bid conference or site visit will result in automatic disqualification.

When adhering to the Rules, pre-bid conferences or site visits can play a crucial role in sharing information with vendors and gaining insight in return. It is a procurement tool that should not be overlooked.

RETAINING TAX EXEMPT STATUS WITH LOWE'S MA087

"Public entities. . . must send an updated tax exemption form in order to continue to receiving a tax exemption" from Lowes.

Agencies and public entities with accounts through the Lowe's Home Centers walk in building supplies contract must send in an updated tax exemption form in order to continue receiving a tax exemption.

The entities shall work directly with the Lowe's Tax Exempt Support Team at Salestax@Lowes.com to verify and update their tax status.

State Finance and Tax Commission have worked together to make the process of obtaining a tax exemption certificate easier for State Agencies.

1. Go to finance.utah.gov
2. Click "Finance Forms" which is located on the right under DAS SERVICES
3. Roll to the bottom of the forms page

and locate "TC—721G Exemption Certificate for Government & Schools"

4. If you are already logged into the State server, the document will open immediately, otherwise, the State employee will be requested to log in. The sales tax number self-populates based on the individual's agency.

5. Save the document to the hard drive.
6. Open the document from save location. Fill in the information and print.
7. Obtain the authorized signature.

Other public entities should consult their finance group concerning their sales tax license number and fill out the TC-721G Certificate available on the [Tax Commission's form page](#).

RQS/RQM AND SPECIFICATIONS FIRST

"The Division of Purchasing cannot begin working on a purchase/solicitation until they have received the approved RQS/RQM from FINET."

"Should we buy a procurement item?" is a question is frequently raised. A variety of judgements occur as the agency makes the decision to move forward, but once made, the process of procurement is outlined in Code, Rule, Policy, and Procedure. For procurements exceeding \$5,000, an agency must send the procurement to the Utah Division of Purchasing by entering a request into FINET.

A Standard Requisition (RQS) or a Master Agreement Requisition (RQM) in FINET is the vehicle whereby the agency management signals their approval for the purchase. FINET approval by management also signals that the funds are available to make the purchase. Further, an RQS pre-encumbers the funds, retaining them for the PO that will be created after award.

The Division of Purchasing cannot begin working on a purchase/solicitation until they have received the approved

RQS/RQM from FINET and the specification documentation in the purchasingsolicitations@utah.gov email. The complete RQS/RQM number as the subject of the email allows for efficient matching of specifications to the RQS/RQM.

Delays in the procurement process can occur when: 1) the RQS/RQM is not submitted in FINET and therefore does not move forward for management approval; 2) when management does not apply approval in FINET; or 3) when the specifications are not received through the purchasingsolicitations@utah.gov email.

As the Division of Purchasing can only begin working on a solicitation when they have the approved RQS/RQM and the specifications, agencies are encouraged to enter an RQS/RQM in FINET as soon as the decision to procurement goods and services has been made.

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**We're on
the Web !**

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

PUBLIC BID OPENINGS

By Windy Aphayrath

To ensure full compliance with Utah Code 63G-6a-604, the Division of Purchasing has amended its bid opening process.

Bids will be opened publicly, in the presence of one or more witnesses, at the State of Utah Division of Purchasing, 3150 State Office Building, 450 North State Street, Salt Lake City, Utah at the date and time referenced in the Sealed Bid Open Date. Bidders will be asked on the solicitation to acknowledge that this

opening is in full compliance with Utah Code 63G-6a-604.

Bidders will be welcome to attend the bid opening. Bidders will also be asked to acknowledge on the solicitation that in order to attend bid openings, a code of conduct will apply. In accordance with Utah Code 63G-6a-604(5), the cost components of bids will not be available for public disclosure until after an award is made.

WELCOME AND FAREWELL

State Purchasing welcomes two new contract analysts: Amy Gerrard and Cassidee Feinauer.

Amy Gerrard received her Juris Doctor degree from S.J. Quinney College of Law at the University of Utah. Amy has worked for Technology Venture Commercialization at the University of Utah where she negotiated various contracts addressing commercialization of new technologies and inventions made and developed at the University of Utah. When she isn't in the office, you can find her under the hood of her 65' Ford Mustang.

Cassidee Feinauer received her Juris Doctor degree from J. Reuben Clark Law School at Brigham Young University. During that time, she served as a Lead Editor for the Education and Law Journal and participated on the Vis International Moot Court team. Most recently, she worked as a Law Clerk for the Attorney General's Office in the Highways & Utilities Division and occasionally with the State Agency Counsel Division.

State Purchasing says farewell to Rachel Cheney who is leaving to stay home with her wonderful new son. We wish her and her family the best.

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
Cloud Solutions	AR2504	GuideSoft, Inc. dba Knowledge Services	4/1/2017-9/15/2026	
Cloud Solutions	AR2476	CherryRoad Technologies, Inc.	9/30/2016—09/15/2026	
Cloud Solutions	AR2489	Smartronix, Inc.	09/16/2016 - 09/15/2026	
Computer Equipment and Related Services (Desktops, Laptops, Tablets, Servers, and Storage)	PA2209	Lenovo (United States), Inc.	9/29/2015 – 3/31/2020	
Computer Equipment and Related Services (Laptops and Tablets)	PA2214	Panasonic System Communications	10/30/2015 – 3/31/2020	
AUTOMATED EXTERNAL DEFIBRILLATORS	MA196	CARDIAC SCIENCE CORPORATION	02/10/2012-07/31/2017	
AUTOMATED EXTERNAL DEFIBRILLATORS	MA2261	PHYSIO-CONTROL INC	12/02/2015-07/31/2017	
Patient and Wheelchair Lifts	AV2648	Ability 2 Elevate	3/27/2017 - 6/30/2021	
Patient and Wheelchair Lifts	AV2647	101 Mobility	3/27/2017-6/30/2021	
HVAC and Refrigerated kitchen install, Repair, upgrade, service, and maintenance	MA2609	Trane U.S. Inc	3/1/2017-2/28/2022	
Fresh Bread	PD163	Bimbo Bakeries USA, Inc	04/16/2017-04/15/2022	
INTERNET USPS POSTAGE SOFTWARE LICENSE AND SUBSCRIPTION	AR177	STAMPS.COM, INC	THROUGH 07/11/2017	
FRANCOTYP POSTALIA dba: FP MAILING SOLUTIONS, INC	MA2194	FRANCOTYP POSTALIA dba: FP MAILING SOLUTIONS, INC	through 07/11/2017	
Dedicated Short Range Communication Radios 5.9GHz	MA2652	Lear Corporation	04/22/2017–04/10/2022	
Dedicated Short Range Communication Radios 5.9GHz	MA2653	Savari Inc.	04/22/2017–04/10/2022	

*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
Rental Equipment without an Operator	AV2594	Mountain States Industrial Services, Inc.	2/1/2017-1/31/2022	
OILS AND LUBRICANTS	PD2650	J AND J OIL OPERATIONS	3/19/2017-3/18/2022	
VEHICLE LIFTS AND RELATED GARAGE EQUIPMENT (NASPO)	MA2633	Vehicle Service Group, LLC	2/10/2017-2/10/2019	
VEHICLE LIFTS AND RELATED GARAGE EQUIPMENT (NASPO)	MA2002	Mohawk Resources Ltd.	2/10/2017-2/10/2019	
VEHICLE LIFTS AND RELATED GARAGE EQUIPMENT (WSCA)	MA2003	Stertil-Koni USA Inc	2/10/2017-2/10/2019	
VEHICLE LIFTS AND RELATED GARAGE EQUIPMENT (NASPO)	MA2633	Vehicle Service Group, LLC	2/10/2017-2/10/2019	
VEHICLE LIFTS AND RELATED GARAGE EQUIPMENT (NASPO)	MA2632	Hennessy Industries	02/10/2017-02/10/2019	
PAVEMENT MARKING MATERIALS (PREFORMED THERMOPLASTIC)	MA1552	Flint Trading Inc.	4/12/2017-4/11/2022	
Gasoline and Diesel Fuel	PD230	Brian Farm Service Center	4/17/2017-4/17/2022	
	PD231	Petroleum Traders Corporation	4/17/2017 - 4/17/2022	
	PD232	Thompson Oil Company	4/17/2017-4/17/2022	
	PD1333	Thomas Petroleum	4/17/2017-4/17/2022	
	PD1335	Ken Bettridge Distributing	4/17/2017-4/17/2022	
AVIATION FUEL FOR SALT LAKE AIRPORT	PA539	Keystone Aviation LLC dba TAC Air	04/18/2014–04/17/2022	new contract won by the same vendor
MAIL ROOM EQUIPMENT, SUPPLIES & MAINTENANCE (WSCA)	AR173	PITNEY BOWES INC	THROUGH 07/11/2017	
MAIL ROOM EQUIPMENT, SUPPLIES & MAINTENANCE (WSCA)	AR174	NEOPOST USA, INC	THROUGH 07/11/2017	
MAIL ROOM EQUIPMENT, SUPPLIES & MAINTENANCE (WSCA)	AR175	BELL AND HOWELL, LLC	THROUGH 07/11/2017	
MAILROOM SPECIFIC FURNITURE (WSCA)	PD226	VERSIA STORAGE SYSTEMS	THROUGH 07/11/2017	

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NEW STATE OF UTAH "BEST VALUE" COOPERATIVE CONTRACTS

(JOC) Job Order Contracting Vendors

TITLE	CONTRACT	VENDOR	DATES	ADDITIONAL INFORMATION
(JOC) Job Order Contracting	MA2636	CRC Construction Inc.	5/1/2017-4/30/2022	
(JOC) Job Order Contracting	MA2637	CSU Commercial Services Unlimited, Inc.	5/1/2017-4/30/2022	
(JOC) Job Order Contracting	MA2638	Diversified Maintenance Systems, Inc.	5/1/2017-4/30/2022	
(JOC) Job Order Contracting	MA2639	Grand Enterprises, LLC	5/1/2017-4/30/2022	
(JOC) Job Order Contracting	MA2640	HHI Corporation	5/1/2017-4/30/2022	
(JOC) Job Order Contracting	MA2641	HK Consulting, Inc.	5/1/2017-4/30/2022	
(JOC) Job Order Contracting	MA2642	Landmark Companies, Inc.	5/1/2017-04/30/2022	
(JOC) Job Order Contracting	MA2643	Northern Construction LLC	5/1/2017-4/30/2022	
(JOC) Job Order Contracting	MA2644	SIRQ, Inc	5/1/2017-4/30/2022	
(JOC) Job Order Contracting	MA2645	Spindler Construction Corporation	5/1/2017-4/30/2022	
(JOC) Job Order Contracting	MA2634	AJ Construction Inc.	5/1/2017-04/30/2022	
(JOC) Job Order Contracting	MA2635	XCEL General Contracting	5/1/2017-04/30/2022	
(JOC) Job Order Contracting	MA2646	Wadman Corporation	5/1/2017-04/30/2022	

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EXPIRED OR CANCELED STATE OF UTAH “BEST VALUE COOPERATIVE CONTRACTS

TITLE	CONTRACT	VENDOR	DATES	ADDITIONAL INFORMATION
ASSISTIVE TECHNOLOGY – LOW VISION PRODUCTS FOR THE VISUALLY IMPAIRED	MA426	DIGITAL APEX LLC	4/30/2018	

Prior to purchase, end users need to check the contract online prior to purchase to determine if a contract is still active.

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

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