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Justin Johnson, Secretary

MEMORANDUM

TO: Secretaries, Commissioners, Deputies and Exempt Heads
FROM: Susan Zeller, Chief Performance Office
CC: Deb Damore, Jaye Johnson, Business Managers; and Budget Analysts
RE: [Bulletin 3.5 ~ Procurement and Contracting Procedures – Training Road Shows](#)
DATE: June 21, 2016



Bulletin 3.5 ~ Procurement & Contracting Procedures Training Road Show!

As promised in Secretary of Administration, Justin Johnson's June 20th memo, I will be joined by Deb Damore, Director of the Office of Purchasing & Contracting and Jaye Johnson, Assistant Attorney General for several 2-hour Bulletin 3.5 Training "Road-Shows" - coming to a location near you during July 2016.

Quoting Secretary Johnson, *"We strongly recommend all staff involved in procurement, development, review, approval, monitoring, payment and accounting for contracts, including but not limited to management, legal, program, and business office staff, attend a training session for Bulletin 3.5."*

Training will focus on State procurement and contracting basics, as well as the new elements in the July 1, 2016 release of Administrative Bulletin 3.5. Eight (8) classes are scheduled currently and we are looking to add 2 – 4 more. The 8 classes will be held in Waterbury and several Montpelier locations. We are trying to find additional room availability at National Life and possibly in Burlington and/or Barre. Please check the on-line registration (below) and the 3.5 Training Flyer at:

<http://aoa.vermont.gov/sites/aoa/files/Bulletins/3point5/ComboFlyer.pdf>. Both on-line registration and the 3.5 Training Flyer will be updated as new dates/sites are added.

Please see the attached brochure and course description for the 3.5 Training Road Shows.



[Click button]

Or this URL to register: <https://secure.vermont.gov/DHR/eventreg/>



Bulletin 3.5 ~ Procurement & Contracting Procedures Training “Road Show”

2 Hour Session, Multiple Dates,
Morning or Afternoon

Location: Waterbury (W), National Life (NL), Montpelier (M1 & M2), Burlington (B1), and VTCC-Berlin (B2)

Register at:

<https://secure.vermont.gov/DHR/eventreg/>

(CALL 802-828-3322 IF UNABLE TO REGISTER ON-LINE.)

Presented by: Sue Zeller, Chief Performance Officer; Deb Damore, Director Office of Purchasing & Contracting, and Jaye Johnson, Assistant Attorney General.

Learn State procurement & contracting basics; what's new in the 7/1/2016 version of 3.5; plus, Q&A with the experts.

Dates, Time and Location:

Register online, attend any session with openings.

Email confirmation will be sent with exact location and conference room info.

Date	Time	Location
07/08/16	9:00 AM	W - Fox
	2:00 PM	W - Fox
07/12/16	9:00 AM	NL-AOT
	2:00 PM	NL-AOT
07/13/16	9:00 AM	M2
	2:00 PM	M2
07/15/16	9:00 AM	
	2:00 PM	
07/22/16	9:00 AM	
	2:00 PM	
07/26/16	9:00 AM	M1
	2:00 PM	M1

Location Legend:

W – Waterbury
M1 – Montpelier – Pavilion Bldg
M2 – CAPS Training Center
NL – National Life
B1 – 108 Cherry, Burlington
B2 – VTCC – VTrans Training Center, Berlin

Bulletin 3.5 ~ Procurement & Contracting Procedures Road Show

In this 2-hour session, you will learn about the basics of State Procurement & Contracting (Bulletin 3.5), and new changes to Bulletin 3.5 effective 7/1/16, plus a question & ask opportunity. The course will be taught by Sue Zeller, Chief Performance Officer and Deb Damore, Director of Purchasing & Contracting, both with more than 11 years of expertise with the State's Bulletin 3.5, contracting and purchasing. Classes are open to any State employee involved in the procurement, development, review, approval, monitoring, payment and accounting for contracts, including but not limited to management, legal, program, and business office staff.

Topics Discussed:

- New statutory definitions for Contracts for Service, Personal Service, Non-Personal Service
- Federal Determination for Independent Contractors
- Change to AGO Certification
- Insurance and Workers' Comp Coverage and Rules
- Thresholds Changed
- Using the New Short-Form Contract Package
- New rules on MOU/MOA use
- Streamlined Approval for Amendments
- Waivers and Contracting Plans
- Tips on RFPs, BDAs, and Bidding in General
- Tips on Drafting Contracts
- New Requirements for Attachments C and D
- Changes to Required Approvals
- Public Records and Public Endorsement
- Charge Order Process
- IT Guidelines
- VISION Tracking Changes
- And, More...