



STATE OF RHODE ISLAND

Division of Purchases

Department of Administration

PURCHASES 101

Welcome to Purchases 101.

This presentation is useful for all agency procurement user roles; Requisitioners, Contract Managers, Solicitation Developers and Leadership are encouraged to view this presentation.

Provided by:

**Nancy McIntyre, State Purchasing Agent
Amanda Rivers, Deputy Purchasing Agent
Meredith Skelly, Deputy Purchasing Agent**

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R.I. Gen. Laws §37-2-1, ET. SEQ. (“State Purchases Act”)



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Determining the Procurement Method



Access to Agency Resources



Code of Ethics and Professional Behavior

WORKING WITH THE DIVISION OF PURCHASES

MISSIONS AND FUNCTIONS

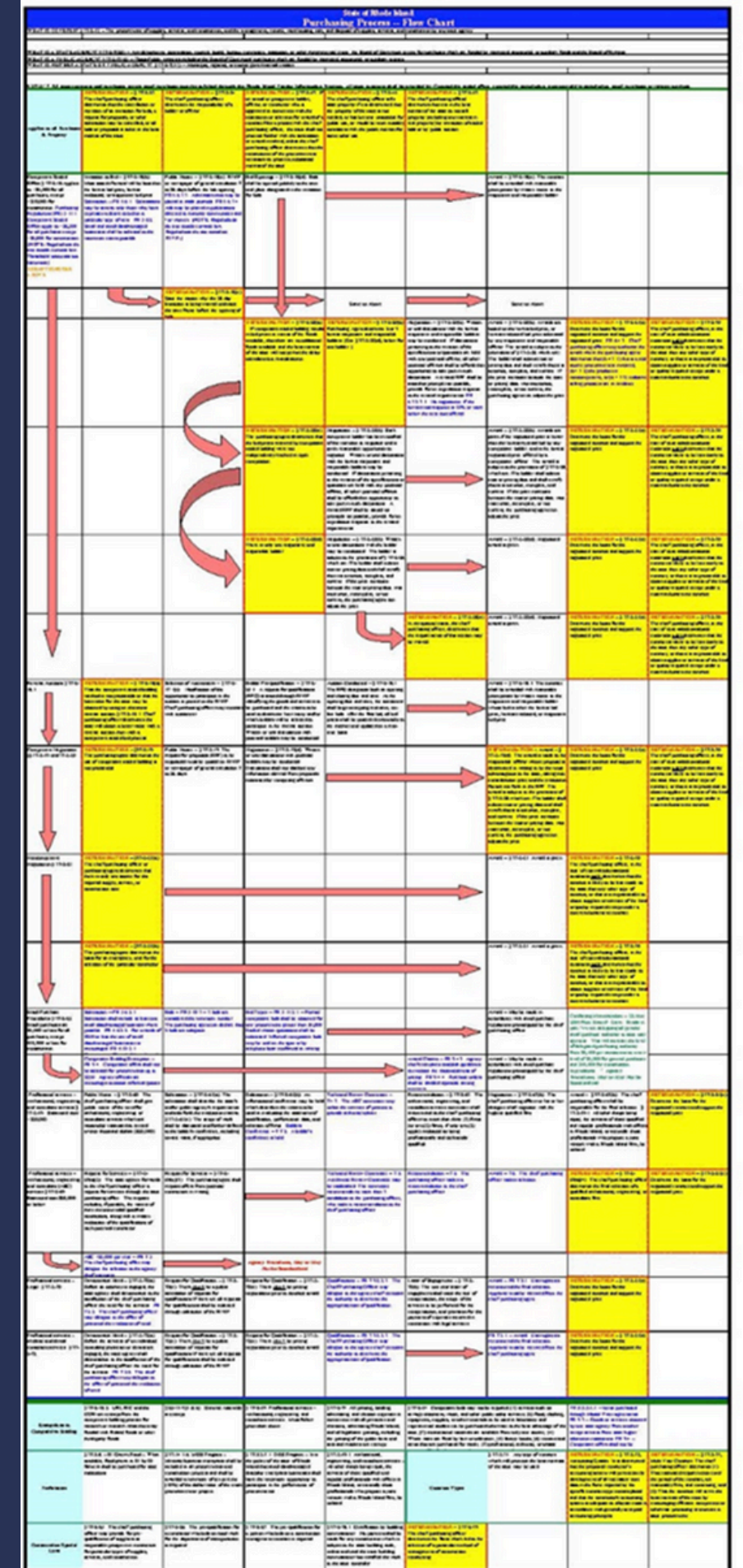
- The Division of Purchases is the centralized procurement authority for the State of Rhode Island.
- Our goal is to obtain the best value for the taxpayer.
- This can be accomplished by providing an “equal playing field” for all potential vendors, enhancing opportunities for small businesses, minority/women owned businesses, and disability business enterprises, and by leveraging State purchasing power on all procurements.

STAFF STRUCTURE AND WORKLOAD

- 36 staff including 15 Procurement Specialists and 3 Senior Level Commodity Team Leads.
- Annually solicit over 1,000 bids which includes Request for Proposal (RFP), Request for Quote (RFQ) and Request for Information (RFI). This is a non-inclusive of sole/single source requests, emergency procurements, mini-bids, grants and delegated authority procurements.
- Management of the life cycle of the contracts issues, e.g., change order process.
- Consultative services to agencies and vendors and MPA contract management.



STATE PURCHASES ACT FLOW CHART



DOA Director/Chief Purchasing Officer

Jonathan Womer

State Purchasing Agent

Nancy McIntyre

Chief Implementation Aide

Kelley Connors

Chief of Staff

Alicia Pomfret

Deputy Purchasing Agent

Amanda Rivers

Deputy Purchasing Agent

Meredith Skelly

Administrator of Purchasing Systems

(Construction)

Thomas Bovis

Administrator of Purchasing Systems

(Health & Human Services)

David Francis

Administrator of Purchasing Systems

(Goods & Services)

Maxwell Righter

**Assistant Procurement Specialist
(Grants/Delegated/APRA)**

Douglas Loiselle

**Assistant Procurement Specialist
(Records/APRA)**

Andrea Smith

**Assistant Procurement Specialist
(Records/APRA)**

Donovan Burtan

**DCAMM Contracts and Specifications,
Assistant Administrator**

Gary Mosca

**Contracts and Specifications, Assistant
Administrator**

Katherine Missell

DOT Chief Procurement Specialist

Michael [Scott] Stephens

Senior Procurement Specialist

Marisa DeFarno

Procurement Specialist II

Frederick Cavallaro

DOT Procurement Specialist I

Colleen Brousseau

Procurement Specialist I

Matthew Wood

Assistant Procurement Specialist

Hannah Cariati

Assistant Procurement Specialist

VACANT

DOT Assistant Procurement Specialist

VACANT

Chief Procurement Specialist

Robert DeAngelis

Procurement Specialist II

Clarisa Encarnacion

Procurement Specialist II

Luke Lawrence

Assistant Procurement Specialist

Jonathan Valdez

Chief Procurement Specialist

Gail Walsh

Senior Procurement Specialist

Gerald Teixeira

Senior Procurement Specialist

Jonathan Nadeau

Procurement Specialist I

Bridgette Dubois

Procurement Specialist I

Austin Goodness

Assistant Procurement Specialist

Diane Silva

**Programming Services Officer
(Testing)**

Donna Brennan

**Programming Services Officer
(Training)**

Giovonah Vittorioso

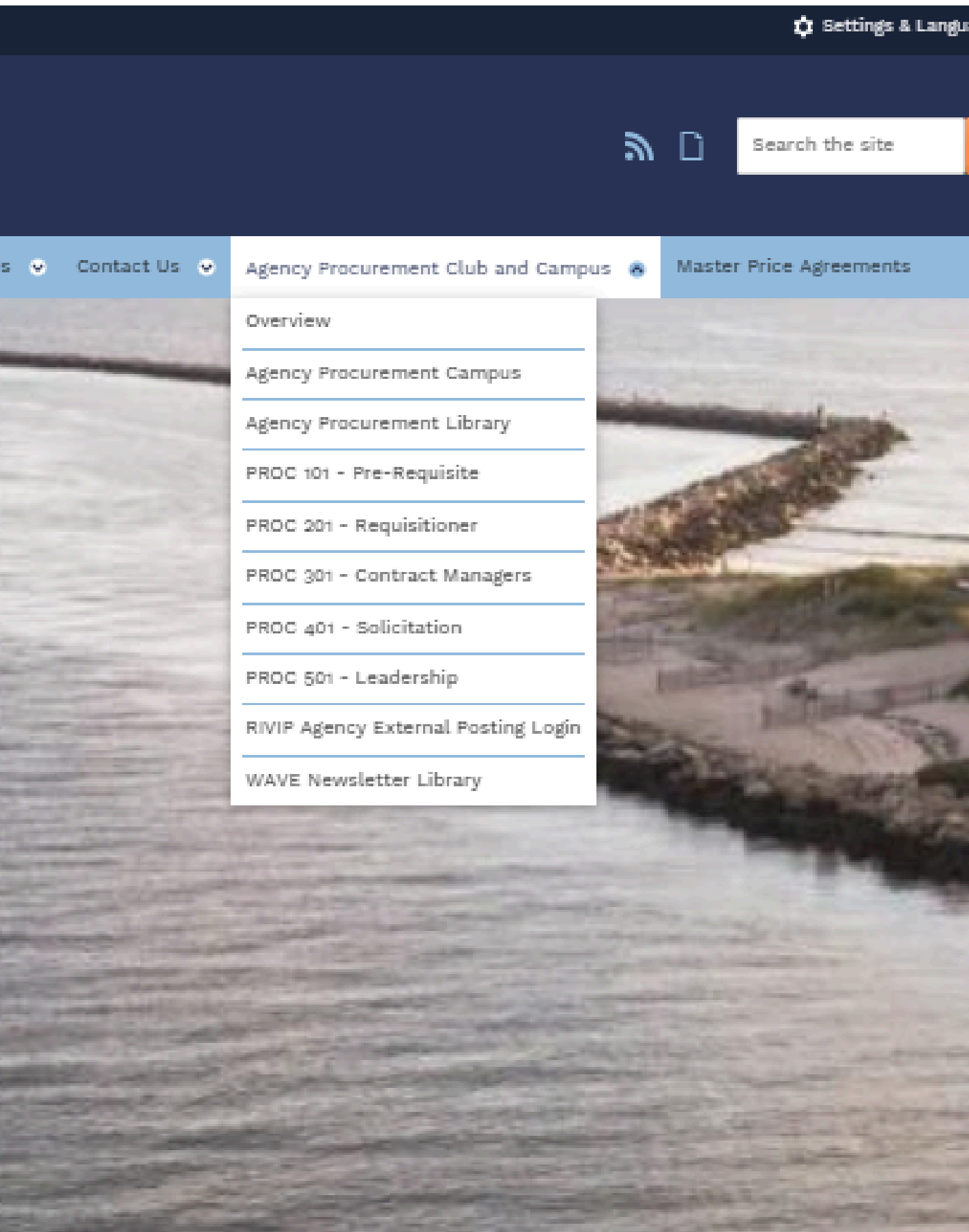
**Assistant Procurement Specialist
(Supplier Coordinator)**

Donald Paquin

**Assistant Procurement Specialist
(Supplier Coordinator)**

Amanda Menard

WORKING WITH THE DIVISION OF PURCHASES: MORE INFO AND NEXT STEPS



[Agency Procurement Club and Campus](#)

Online resources for business processes, training materials, templates and guides.

[Agency Procurement Library](#)

Quickly access Forms, Guides, Templates and Tools. All agency procurement documents are arranged in alphabetical order.

- The Purchases website is a valued resource for agencies to use in reviewing posted solicitations, MPA user guides, and general purchases information, rules, procurement regulations and legislation.
- Always use the most recent version of templates, forms and tools.
- Recommended Read at the [Agency Procurement Library](#) is “Checklist: RFP Process.”

WORKING WITH THE DIVISION OF PURCHASES

- RIFANS system hosts order management
- Ocean State Procures™ (OSP) online system hosts:
 - Bid Board for Centralized Agency Bid Postings
 - Contract Board for MPA Contract Awards
 - RIDOT Solicitations
 - Vendor Registration
 - Over 10,000 Vendors Registered
 - Vendor Bid Submissions



WORKING WITH THE DIVISION OF PURCHASES:

Benefits of Agency Partnerships



An upfront investment in strategy and needs assessment, and Purchases partnership, can lead to a more effective and timely procurement process.

For best outcomes:

- Upfront needs assessment
- Open dialogue with agency stakeholders

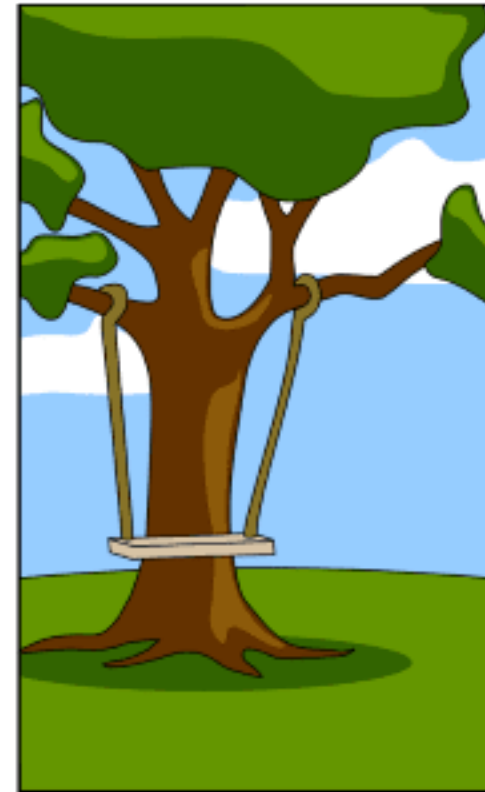
Cooperative procurement planning reduces delays caused by:

- Bid protests/legal challenges
- Unclear agency objectives and strategy
- Poor or overly ambitious timeline management at agency level
- Insufficient funding

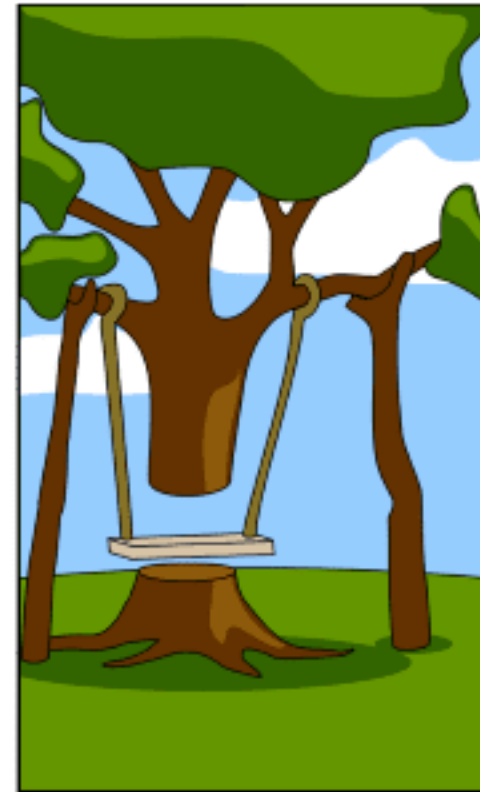
SOME PROCUREMENT PERSPECTIVE...



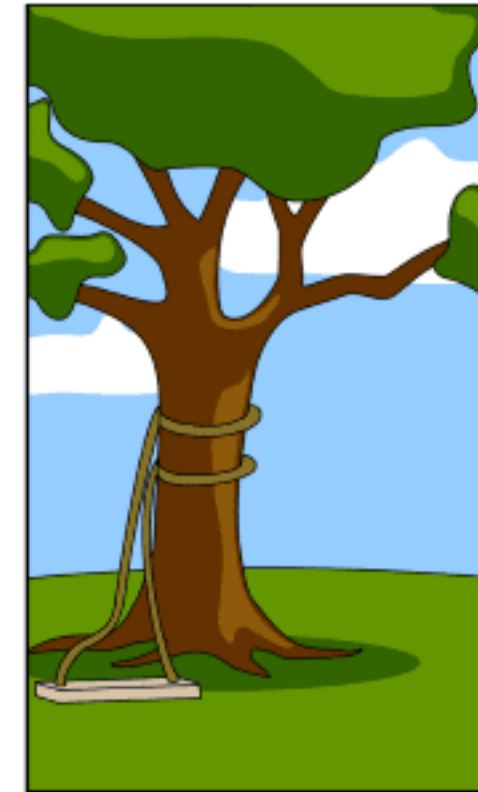
How the Agency explained it



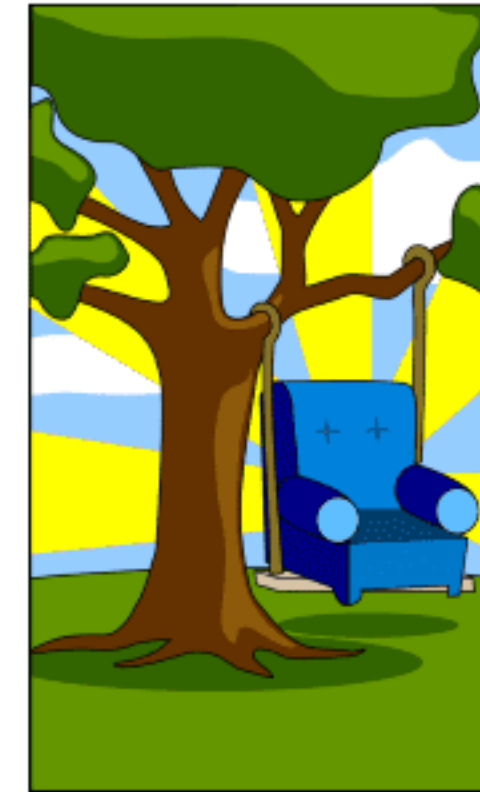
How the Project Manager understood it



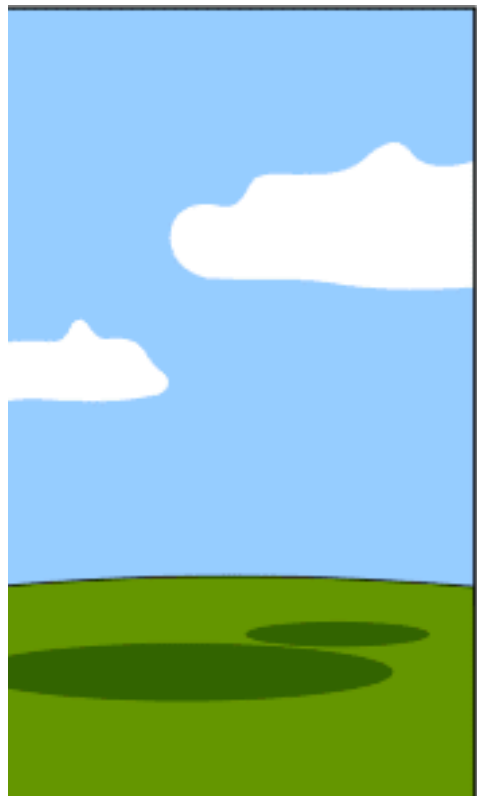
How the Engineer designed it



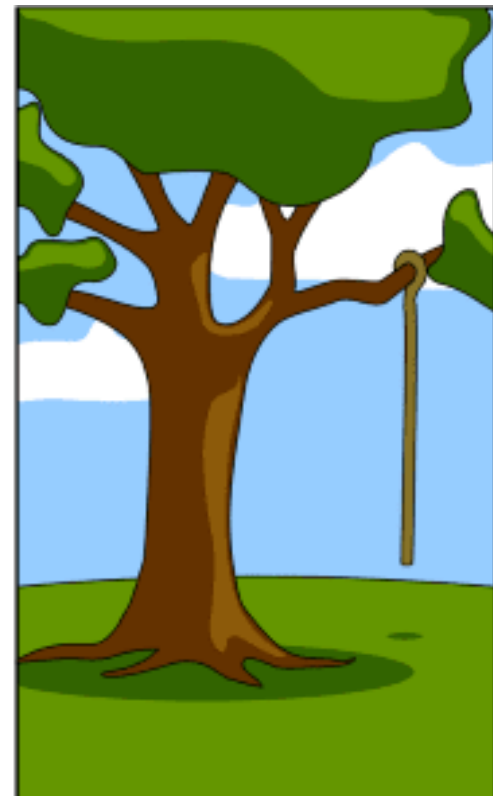
How the Program Manager wrote the RFP



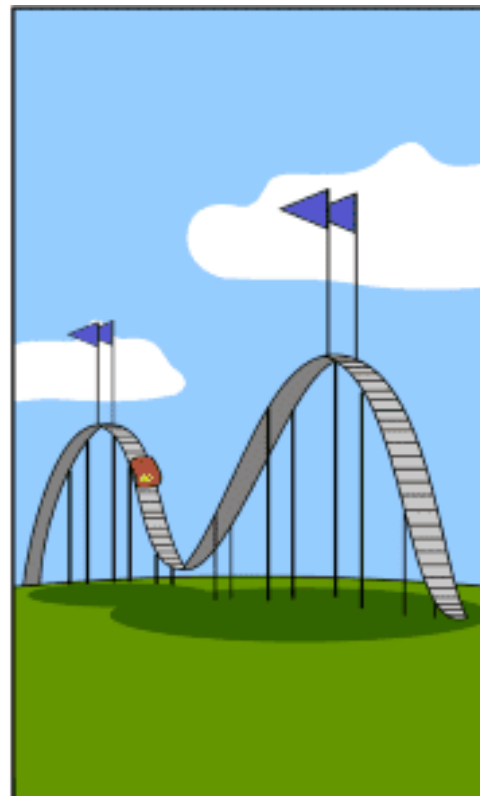
How the Agency Director described it



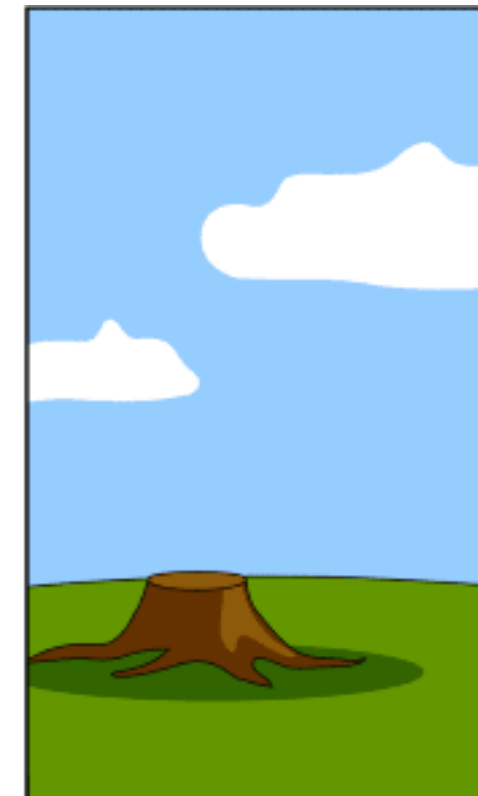
How the CERF approvals were documented



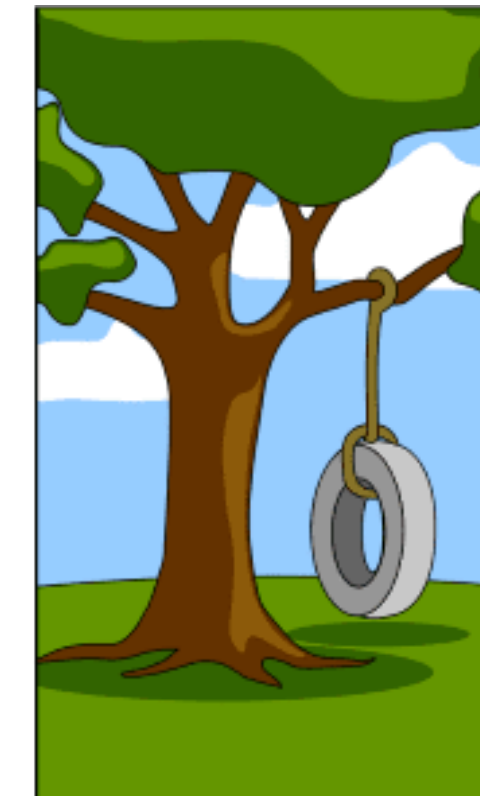
How the Vendor installed it



How the Vendor invoiced it



How RIFANS supported it



What the Agency really needed

PUBLIC PROCUREMENT CONCEPTS



- **Full & Open Competition**

- **Transparency**

- **Established Procedures**

- **Support of Socioeconomic Goals**

MASTER PRICE AGREEMENTS “MPA”

- Universal needs for goods/services
- Create your own release/direct Purchase Order
 - Read MPA user guide specific to the MPA - \$0 (zero dollar) purchase agreement requisition often required, instead of a release.
- Multi-State cooperative agreements (NASPO, Sourcewell, US Commodities, Omnia Partners)
- MPAS listed on the [OSP Contract board](#)
- If you have a suggestion for a new MPA, please let us know



Master Price Agreements
Contract Board

WORKING WITH THE DIVISION OF PURCHASES

Procurement Methods

Option	Description	Application	Timing
Master Price Agreement (MPA) Multiple award	<ul style="list-style-type: none">• Solicited as RFP or RFQ• Universal needs for goods or services• Provides agency access to qualified vendors• Caps for pricing• Caps for project cost	<ul style="list-style-type: none">• Agency expedited process• May provide agency opportunity for mini-bid• 3 quotes	<ul style="list-style-type: none">• Similar to an RFP/RFQ• Award may be issued for multiple years with renewal options
Master Price Agreement (MPA) Open Enrollments (OE) Multiple Award	<ul style="list-style-type: none">• Prequalified vendor list• Vendor proposal submission is ongoing	<ul style="list-style-type: none">• Permits ongoing enrollment opportunities for vendors to join existing MPAs (where available)	<ul style="list-style-type: none">• Ongoing solicitation that allows vendor entry to the qualified list over a greater length of time (exceeds the RFP/RFQ 28-day timeline)

DIY PROCUREMENT

Small Purchase Delegated Authority

- Available to all agencies
- Amounts between \$500 and \$10,000 for goods and services
- Amounts between \$500 and \$25,000 for construction services
- Use of MPA, MBE/WBE and local vendor when possible

Delegated Purchase Authority for Agencies

- Available ONLY to agencies granted specific delegated limit(s)
- Request for limited delegated authority to DOA Director as Chief Purchasing Officer via Delegated Authority Request Form
- Authorization issued by DOA Director/Chief Purchasing Officer
- Program/Agency-Specific
 - Limited in scope and duration

SMALL PURCHASE DELEGATED AUTHORITY (SPDA)



State of Rhode Island, Department of Administration
Division of Purchases
One Capitol Hill
Providence, Rhode Island 02908
www.purchasing.ri.gov (401) 574-8100

On January 1st, 2024, Small Purchase Delegated Authority was changed to increase the maximum threshold as follows:

- Amounts between \$500 and \$5,000 for goods and services is now between \$500 and \$10,000
- Amount between \$500 and \$10,000 for construction services is now between \$500 and \$25,000

What this means moving forward:

- The maximum threshold increase provides wider use of the SPDA's three quote process before required to perform a competitive bid.

SPDA Three Quote Process:

- At least three (3) written quotes shall be obtained. At least one of the quotes must be from a certified MBE/WBE, assuming there is an MBE/WBE capable of providing the goods or services. Additionally, at least one (1) of the three (3) required quotes must be from a local vendor, again assuming there is a local vendor capable.
 - This local vendor may be the same vendor used to satisfy the MBE/WBE requirement.

**DELEGATED AUTHORITY - SMALL PURCHASES
AUTHORIZATION FORM (R. I. Gen. Laws § 37-2-22)**

Requesting Department/Agency: _____ Requisition #: _____

Good or Service to be Procured: _____

Procurement less than \$500. The department or agency may proceed with a vendor of its choosing, but the Division of Purchases ("Division") recommends contacting, if available, a certified Minority or Women-owned Business Enterprise (MBE/WBE) or a "Local Vendor." A "Local Vendor" is a non-foreign, domestic business enterprise whose principal office, according to the Corporate Database maintained by the Secretary of State at <https://business.sos.ri.gov/CorpWeb/CorpSearch/CorpSearch.aspx>, is located within the State of Rhode Island.

MPA Requirement. Departments and agencies shall first utilize an applicable MPA to the extent one is available. If there is a certified MBE/WBE on an MPA covering services, the department or agency is required to get a quote from the certified firm. Refer to specific MPA Contract User Guide for further information. Should an MPA not be available, the department or agency should utilize the below process. If an MPA vendor is ultimately utilized, departments and agencies do not need to submit this form to the Division. For more information on available MPAs, please call the Division of Purchases and/or visit its website (contact information listed above).

Three written quotes required. For general procurements between \$500 and \$10,000 (\$25,000 for construction services), at least three (3) written quotes shall be obtained through e-mail, fax or the internet. At least one of the quotes must be from a certified MBE/WBE, assuming there is an MBE/WBE capable of providing the goods or services. Additionally, at least one (1) of the three (3) required quotes must be from a local vendor, again assuming there is a local vendor capable of providing the goods or services. This "local vendor" may be the same vendor used to satisfy the MBE/WBE requirement, but agencies must still get a total of three (3) written quotes for any procurement under this delegated small purchase authority.

In order to get the most cost effective pricing, as a general rule, departments and agencies should award contracts to the lowest responsive and responsible bidder. However, there is an exception regarding the State's interest in supporting Minority Business participation. When awarding to an MBE/WBE that was not the low bidder, section 5.12.1.2.3 of the State of Rhode Island Procurement Regulations and section 25(b) of the Regulations' Appendix A - General Conditions of Purchase, allow selection of the MBE's/WBE if its price quote is within a competitive range,

AGENCY-SPECIFIC DELEGATED AUTHORITY

- Requisition Type: Delegated
- Attach copy of delegated authority approval letter/package signed by Director of Administration
- Vendor/Agency agreement



DELEGATED PURCHASE AUTHORITY FOR AGENCIES

220-RICR-30-00-2

- **2.2.C.1** - Delegated Purchase Authority shall mean the transfer of Purchasing Authority from the Chief Purchasing Officer or the Purchasing Agent to another State official in accordance with the provisions and limitations of R.I. Gen. Laws §37-2 and the regulations set forth herein.
- **2.2.C.1.d.(1)** - All delegated purchasing authority shall be specific as to:
 - (1) The names and titles of individuals authorized by an agency director to commit funds on behalf of his agency
 - (2) The accounts, commodities and levels of expenditures for which the agency director authorizes individuals to commit funds
- **2.2.C.1.d(2)** - All delegated purchases authority shall be specific as to the accounts, commodities and levels of expenditures for which the agency director authorizes individuals to commit funds.
- **2.2.C.1.f** - The implementation of Delegated Purchasing Authority shall be monitored by the Purchasing Agent and the State Controller. If at any time a user agency is deemed to be in violation of purchasing rules, regulations, policies and procedures, the Chief Purchasing Officer or the Purchasing Agent, with the approval of the Chief Purchasing Officer, may revoke any Delegated Purchasing Authority privilege which has been previously granted.
- Delegated purchase authority may be revoked if at any time a user agency is deemed to be in violation of purchasing rules and Procurement Regulations, policies and procedures.
- Purchase order, batch payment, - must be outlined in the request for delegated purchase authority.
- Subject to review by Office of Internal Audits.

ARCHITECTURAL, ENGINEERING, OR CONSULTANT SERVICES

Under \$20,000 (R.I. Gen. Laws §37-2-69)



- Agency obtains 3 written quotes from eligible vendors via direct email outreach.
- Agency recommends award to lowest responsive, responsible bidder.
- Every effort should be made to contact Rhode Island vendors and at least one Minority Business Enterprise (“MBE”) vendor.
- Agency sends requisition, quotes, and recommendation to DOA/Purchases along with specific request form located at the Agency Procurement Library
 - Vendor must be fully registered in OSP to issue a Purchase Order
- DOA Director/Chief Purchasing Officer has final approval.



**DO NOT
ADDITIONALLY DIVIDE
INITIALLY DIVIDE
PROCUREMENT**

**If there is no MPA and
need does not fall
within Small Purchases
Delegated Authority or
Agency-Specific
Delegated Authority,
interface with the
Division of Purchases**



RIFANS REQUISITIONS: SCOPE AND PURPOSE FOR COMPETITIVE SOLICITATIONS

Statement of Need: Tell us what you want.

- Requisition created by the agency in RIFANS.
- Confirms the funding source.
- Clearly identifies the goods/services requested.
- Authorizes the Purchasing Agent to act on behalf of the agency upon full approval at the agency level.



REQUISITIONER KICK START BUNDLE

These items will help get you on your way to learning how to's as a RIFANS Requisitioner

Comprehensive RIFANS How To's

- [RIFANS Requisitioner Manual Comprehensive](#)

Check Lists - RIFANS Quick Hits

- [RIFANS Blanket and Contract Release Check List](#)
- [RIFANS Req and PO Search Check List](#)
- [RIFANS Electronic Change Orders Check List](#)
- [RIFANS PDF Fillable Form Change Order Check List](#)
- [RIFANS Fillable Form Change Order](#)



PUBLIC PROCUREMENT PRINCIPLES: RESPONSIVE

- A proposal (bid) which conforms in all material respects to the solicitation.
- Determination takes place at the time of offer evaluation.
 - RFQs = Bid opening; RFPs = Prior to award
- Responsiveness = Contractual Promises.



PUBLIC PROCUREMENT PRINCIPLES: RESPONSIBILITY

Offeror has the capability, in all material respects, to perform the contract.

Capability determination is at the discretion of the State Purchasing Agent and includes:

- Experience
- Integrity
- Reliability
- Capacity
- Facilities
- Equipment
- Financial Resources & Management Capability



METHODS OF PUBLIC SOLICITATION

- Request for Quotations: **RFQ**
- Request for Qualifications: **Solicitation Type Varies**
- Request for Information: **RFI - No Award**
- Request for Proposals: **RFP**



WORKING WITH THE DIVISION OF PURCHASES:

Market Research Options

The RFI is a market research tool used to gain expertise from industry leaders.

Option	Description	Application	Timing
RFI: No award	<ul style="list-style-type: none">• Collects written information about the capabilities of the market.• Interview/demo is an additional option available• Information used to develop robust, on-target RFP scope of work	<ul style="list-style-type: none">• When agency wants additional information on available services and providers before designing the RFP• Way to signal vendor interest in service area	<ul style="list-style-type: none">• Posted for 28 days• 1-2 month review• Allow adequate time to develop RFP that incorporates discoveries from RFI

WORKING WITH THE DIVISION OF PURCHASES:

Requests for Quotations (RFQs)

Option	Description	Application	Timing
<p>RFQ: Awarded to lowest, responsive, responsible bidder</p>	<ul style="list-style-type: none">• Fixed, limited scope of work	<ul style="list-style-type: none">• Goods, construction	<ul style="list-style-type: none">• Posted for 28 days• 1-2 week for review• 21 days for tentative award• 7 days for Purchase Order to issue• Important: No work to commence without a Purchase Order

WORKING WITH THE DIVISION OF PURCHASES:

Requests for Proposals (RFPs)

Option	Description	Application	Timing
RFP: Awarded on best value	<ul style="list-style-type: none">• Incorporates a defined scope of work• Technical and cost components• Technical review team scores proposals based on expertise	<ul style="list-style-type: none">• Typically services-based• When technical expertise is critical to the project	<ul style="list-style-type: none">• Posted for 28 days• 1-2 months for technical review• 21 days for tentative award• 7 days for Purchase Order to issue• Important: No work to commence without a Purchase Order

Did you know?

Purchases created a check list to guide you through the RFP Process. The Agency Procurement Library should be accessed each time you draft an RFP to ensure the most current version of the RFP Template and RFP Checklist are used. Find them listed under O & OSP

WORKING WITH THE DIVISION OF PURCHASES: WHEN AND HOW TO PARTNER ON AN RFP PROJECT

- RFP services should be rebid 9-12 months prior to contract expiration
- Review and update scope of work/specifications
- Review and update evaluation criteria
- Consider an RFI for thorough market research
- Consult with Purchases upon approved scope of services at agency
- Prior to submission of a requisition for solicitation posting, discuss with Purchases the associated scheduling and buyer availability
- Work with DOA Risk Management team to assess and recommend appropriate insurance levels based on project scope of work.

R.I. GEN. LAWS §37-2-13.1

AGENCY & BIDDER ATTESTATIONS

- Signed into law by Governor McKee on June 29, 2022.
- Prohibits entities from bidding on Requests for Proposals if they participated in or were consulted with respect to the planning, drafting, or formulation of that Request for Proposals.
- Implementation by the Division of Purchases.
- All agency personnel who were involved in planning/drafting process for RFPs must execute and submit an Agency Attestation Form
- All vendors who submit proposals in response to RFPs must execute and submit a Supplemental Bidder Attestation Form
- DOA Enterprise Policy: [Here](#)

PUBLIC WORKS (NON-RIDOT) VENDOR PREQUALIFICATION

Prequalification of Public Works Vendors

- The Division of Purchases Regulations require that all vendors who wish to bid on non-Department of Transportation (DOT) public works projects with an estimated value of \$1,000,000 or higher must be prequalified by the Division of Purchases prior to bid.
- Prequalification is a program and not associated with any particular bid.
- A full copy of the regulation text can be found [here](#).

PURCHASE ORDER / CONTRACT AWARD

Standard Purchase Order:

- Total award \$ specified
- Funds encumbered

Blanket Purchase Agreement:

- Capped
- Term stated
- Lines established with unit price and unit of measure
- Funds encumbered at release “Blanket Release”

Contract Purchase Agreement:

- \$ capped
- Term stated
- No lines in RIFANS on a contract purchase agreement
- Funds encumbered at release (contract release identified as Standard Purchase Order in RIFANS with supplier site of “99”)



CHANGE ORDERS ISSUED TO DOA/PURCHASES 220-RICR-30-00

Procurement Regulations § 8.1-Definitions

- 8.1.A "Change order" shall mean a written authorization signed by the purchasing agent directing or allowing the contractor to proceed with changes, alterations, or modifications to the terms, conditions, or scope of work on a previously awarded contract.
See, R.I Gen. Laws §§ 37-2-7(2) and 37-2-7(7).

Procurement Regulations 8.7-Changes to Purchase Orders

- 8.7.A All agreements and changes to scope of work, price, or other terms shall be incorporated into purchase orders via "change order" documents incorporating contract amendments.
- 8.7.B Change Orders issued by the Division of Purchases shall be the only binding documents which may create a change in a purchase order.
- 8.7.C Personnel shall not commit the state to technical/contractual changes to purchase orders without first securing all necessary approvals.
- 8.7.D All discussions of potential changes (oral or written) may be disclaimed as not being binding on the supplier or the state until formally incorporated in the purchase order.
- 8.7.E In general, change orders shall be issued by the Division of Purchases following receipt of quotations and memorialization of price and delivery with the supplier. If circumstances preclude immediate issuance of a formal change order, interim direction to the supplier may be made via a letter of authorization signed by the Purchasing Agent.
- 8.7.F Any request for retroactive approval of a change order valued at less than one hundred thousand dollars (\$100,000) must be submitted to and approved by the Purchasing Agent. Any request for retroactive approval of a change order valued at more than one hundred thousand dollars (\$100,000) must be submitted to and approved by the Chief Purchasing-Officer.

SOLE SOURCE AWARDS R.I. GEN. LAWS § 37-2-21(A)

What is a Sole Source?

A sole source procurement is a procurement where only one source is practicably available for the goods or services required.

What is a Single Source?

A single source procurement is one in which two or more vendors can supply the commodity, technology and/or perform the services required by an agency, but the State agency selects one vendor over the others for reasons such as expertise, availability, critical need or previous experience with similar contracts.

What do I need to submit with a Sole Source or a Single Source?

Submit **justification form** with requisition – get it at the [Agency Procurement Library](#)

Detailed response for every justification question required

EMERGENCY PROCUREMENTS

R.I. GEN. LAWS § 37-2-21 (B)

STATE OF RHODE ISLAND AND PROVIDENCE PLANTATIONS
DEPARTMENT OF ADMINISTRATION
DIRECTOR'S OFFICE

INTER-OFFICE MEMORANDUM

TO: Directors
Key Personnel
Chief Financial Officers

FROM: Rosemary Booth Gallogly
Acting Director/Chief Purchasing Officer
Department of Administration

DATE: March 30, 2010

SUBJECT: Emergency Procurements

We have been working on formalizing the "Emergency Procurement" procedures, however, due to the current circumstances I am providing this information to guide your agency in procuring necessary goods and/or services. Please be reminded of the applicable laws and regulations related to emergency purchases. The Division of Purchases is available to assist

Emergency Procurements

contractor, shall be included in the contract file.

In addition, please be aware of Purchasing Rules 9.6 which deals with emergency purchasing. (copy attached hereto)

The above cited law and regulations must be strictly adhered to as purchases are made on an emergency basis. Please make sure that the laws and regulations have been reviewed by the appropriate individual/individual(s) in your agency to assure that all emergency procurements are made in accordance with these laws and regulations.

Whenever possible agencies should utilize vendors on the Master Price Agreements (MPA) and Agency Price Agreements (APA). Purchasing is available to assist in making your procurement and guiding your Division to make the necessary purchases in the most efficient and cost effective manner consistent with state laws and regulations.

- Threat to public health, welfare or safety; failure of critical equipment; threat to property and/or necessary functions.
- Written detailed description of the basis for the emergency required; email to Purchasing Agent.
- Inadequate anticipation of need shall not be considered justification for "emergency" purchases.
- Repairs are limited to only those necessary to address the emergency situation.
- Submit all vendor invoices and required documents via a requisition in RIFANS.

PROCUREMENT GRANTS

- **220-RICR-30-00-10.1 (C)** “Grants” shall mean monies provided by the State to or on behalf of individuals or entities to underwrite specific costs of services or programs. Although grants may be distributed for specific purposes, payment is not based upon supply of specific units of service or products.
- **220-RICR-30-00-5.3 (C)(1)(c)** Grants in the form of general subsidies or assistance shall be administered by state agencies in accordance with legal mandates restricting or defining the use of such funds.
 - \$ distributed specified in Grant
 - \$ distributed by Formula
 - \$ distributed by Competition
 - Requisition to DOA/Purchases with Supporting Documentation
 - Commonly, also includes Delegated Authority Application & Supporting Materials (signed by DOA Director/Chief Purchasing Officer)

FEDERALLY FUNDED GRANTS AND SUB-RECIPIENT AWARDS

- Agency initiates determinations with the Grants Management Office (GMO).
- Formal determination as to whether the entity receiving the awarded funds will be acting in a sub-recipient role or contractor role <https://controller.admin.ri.gov/grants-management>.
- If the determination indicates that the relationship is that of a sub-recipient, the sub-award issuance process will be managed through the grants management system (GMS) when the system is fully implemented.
- If the GMO determination indicates that the relationship is that of a contractor, i.e., one who delivers goods and services for consumption by the state agency, follow state procurement regulations working through the Division of Purchases. Start at the beginning of this document to determine the appropriate solicitation vehicle for your need.
- When clarity is needed Purchases will push back on agencies for determination from the Grants Management Team (GMO) prior to issuing a Purchase Order.

POOR VENDOR PERFORMANCE / POOR AGENCY PERFORMANCE THE DEFICIENCY / COMPLAINT PROCESS


Vendor Performance Issues

- Agency attempts to resolve first
- Notify DOA/Purchases if unresolved Contract Dispute Complaint Form available at the Agency Procurement Library
- Resolution: compromise, suspend, debar, legal action, contract cancellation


Agency Performance Issues

- Vendor attempts to resolve first
- Notify DOA/Purchases if unresolved


OSP CONTRACT BOARD



+ Doing Business with Us



+ Bidding Opportunities



- Master Price Agreements Contract Board

[Contract Board of Master Price Agreements](#)

[Contract Board Quick Start Video](#)

[Contract Board Search Instructions](#)

[NEW Winter 2024 MPA Vendor Contact Listing](#)

Get MPA Contracts and User Guides [here](#)



STATE OF RHODE ISLAND - Department of Administration
 Division of Purchases
 One Capitol Hill
 Providence, RI 02908-5864
 Tel. (401) 574-8100
 Fax. (401) 574-8387
 Website: www.ridop.ri.gov

MPA CONTRACT USER GUIDE

MPA TITLE: [Water, Bottled and Coolers](#)

MPA #: [165](#)

EFFECTIVE PERIOD: [7/1/2023 – 6/30/2026](#)

MPA RENEWAL OPTION(S): [Two – One Year Options](#)

SECTION 1. CONTRACT USE:

Who can use this? This is a Master Price Agreement and, as such, has Statewide Applicability. Political Subdivisions (municipalities, institutions for higher education, municipal/state schools, quasi-public agencies), as authorized by law, may participate in this Agreement. For any projects with a political subdivision, all ordering and billing shall be between the vendor and the political subdivision.

Open Enrollment? No

Emergency Use? Yes

SECTION 2. INSTRUCTIONS FOR USE BY STATE AGENCIES:

Pricing shall be acquired by agencies by developing an order list and submitting to the qualified vendor provided on the Contract Board.

A. THRESHOLDS

There is a \$50K threshold for any specific purchase. Purchases expected to exceed this MPA's threshold must be bid, any exceptions will require Purchasing Agent and/or Deputy Purchasing Agent pre-approval.

No work is to commence until these items are completed and a Purchase Order is issued.

B. MPA SPECIFIC INFORMATION:

State Centralized Agencies New Accounts:

Contract Louise Sawtelle in Accounts and Control before contacting the vendor for service. Once an account is approved, agencies are instructed to review products and pricing from the awarded purchase agreement. Create a blanket release from a selected vendor. Agencies are instructed to **only** receive deliveries that match the release line items.

Contract Board
Search... | Engl

31 Matching Contracts Found Sort Results By Contract Title (Ascending)

Page 1

Status

Expired (14)

Active (17)

Type

Co-Op Contracts (2)

Master (12)

Organizations (2)

State of Rhode Island (30)

Dept of Transportation (1)

Commodities (50)

<input checked="" type="checkbox"/>	<p>BPA1800011 1098-T Services (Tax Credit Reporting)</p> <p>Contract to provide full service to comply with the Taxpayer Relief Act and the American Recovery and Reinvestment Act as related to Higher Education Tax Credits. Testing hyperlink to attachments: https://www.purchasing.ri.gov/RVIP/MPAs/4782016part2.pdf 1. ChangeDetailsReport_RFP18000082_v1_Jun_12_18.pdf</p> <p>Jan 20, 2018 - Jun 8, 2019</p> <p> 123 Easy Supplier</p>
<input type="checkbox"/>	<p>3472490 AMMUNITION - MPA-31 - MULTI</p> <p>AMMUNITION - MPA-31 - MULTI</p> <p>Jun 1, 2016 - Dec 31, 2018</p> <p> 123 Easy Supplier</p>
<input type="checkbox"/>	<p>3479376 AMMUNITION - MPA-31 - MULTI</p> <p>AMMUNITION - MPA-31 - MULTI</p> <p>Aug 9, 2016 - Dec 31, 2018</p> <p> 123 Easy Supplier</p>
<input type="checkbox"/>	<p>3370091 AUTOMATED EXTERNAL DEFIBRILLATORS (MPA-370) 4/1/14 - 12/31/18</p> <p>AUTOMATED EXTERNAL DEFIBRILLATORS (MPA-370) 4/1/14 - 12/31/18</p> <p>Apr 1, 2014 - Dec 31, 2018</p> <p> 123 Easy Supplier</p>

OSP BID BOARD

Bidding Opportunities



>> Learn how to Bid in OSP

The screenshot displays the OSP Bid Board interface. At the top, there is a search bar and navigation icons. Below this, a sidebar on the left contains filter sections: Organization (with a 'Select Organization' button), Status (with checkboxes for Awarded (448), Canceled / Retracted (214), Open (83), and Under Evaluation (170)), and Bid Types (with checkboxes for MPA Mini Bid - Informal (1), Notice of Cooperative Solicitation (5), Notice of Intent - Sole Source (3), Open Enrollment Technical Proposal (71), Open Enrollment Vendor Assessment (171), Qualified List of Vendors (13), Qualified List of Vendors for MPA use ONLY (17), RIDOT Construction Bid (71), and RIDOT Request for Proposal (26)). The main content area shows '915 Matching Solicitations Found' and 'Page 1'. It lists three bid items: RFP23002715 | DCYF-CONGREGATE CARE SERVICES*, RFQ24003141 | Items for School Wellness Rooms*, and TRFP23002502 | DOT: SAFETY AND OPERATIONS SERVICE VEHICLE PATROL PROGRAM*. Each item includes a brief description, start and end dates, and the issuing organization (State of Rhode Island).

Agency Solicitations and Contract Awards

“View Award Reports” functionality provides enhanced transparency

ACCESS TO AGENCY RESOURCES

Procurement Club & Campus


Agency Procurement Club is the landing page for agency users to stay Procurement Information.

- On the RIDOP Toolbar
- Use Drop Down for Quick access

The screenshot shows the website header for the State of Rhode Island Division of Purchases, Department of Administration. The navigation menu includes: Ocean State Procures (OSP), Vendors, Agencies, About Us, Contact Us, and Agency Procurement Club and Campus. The breadcrumb trail is Home > Agency Procurement Club and Campus. A sidebar menu on the left lists: Agency Procurement Club and Campus, Agency Procurement Campus, Agency Procurement Library, PROC 101 - Pre-Requisite, PROC 201 - Requisitioner, PROC 301 - Contract Managers, PROC 401 - Solicitation, PROC 501 - Leadership, RIVIP Agency External Posting Login, and WAVE Newsletter Library. The main content area features a heading 'Agency Procurement (Procurement Campus) Welcome' and a sub-heading 'The Procurement Club'. The text states: 'The Division of Purchases formed the Agency Procurement Club for Agency Procurement Professionals. Our mission is to provide an informal club for agencies to get access to current events and resources. We hope you enjoy this site and will visit often.' Below this is a section for 'The Procurement Campus' which states: 'The Procurement Campus is where agency procurement professionals manage learning curriculums based on procurement roles. Each role is aligned to relevant curriculum procurement tools, templates, and f...'. A dropdown menu on the right side of the page lists: Overview, Agency Procurement Campus, Agency Procurement Library, PROC 101 - Pre-Requisite, PROC 201 - Requisitioner, PROC 301 - Contract Managers, PROC 401 - Solicitation, PROC 501 - Leadership, RIVIP Agency External Posting Login, and WAVE Newsletter Library.

AGENCY PROCUREMENT CLUB AND CAMPUS

Official State of Rhode Island website Settings & Language

 STATE OF RHODE ISLAND
Division of Purchases
Department of Administration

[Home](#) [Ocean State Procures \(OSP\)](#) [Vendors](#) [About Us](#) [Contact Us](#) [Agency Procurement Club and Campus](#) [Master Price Agreements](#)

Welcome to the online Agency Procurement Campus


The Agency Procurement Campus offers *self-guided* Curriculums that are matched to Procurement Roles. Each Curriculum begins with the 101 Pre-Requisite course that delivers procurement fundamentals that all procurement professionals should be familiar with.

All state procurement professionals are welcome to the campus. No registration is required as the campus is designed as *self-guided* curriculums. And the Campus is available at any time.

Nancy McIntyre, State Purchasing Agent, Amanda Rivers, State Deputy Purchasing Agent, and their procurement team encourage you to take a tour, participate in the curriculum and frequent the campus often to access the resources available to you 24/7.

Did you know?...

Our website offers self-guided curriculums that deliver trainings of procurement fundamentals.



PROCUREMENT CAMPUS

Getting Started

This is where you get access to the PROC 101 Pre-Requisite for all curriculums. Plus the Agency Procurement Library and the Agency Procurement Club.

See the Procurement Curriculum Section below to select the curriculum/curriculums that match your procurement role/roles.

PROC 101 - Pre-Requisite

Basic Procurement For all curriculums

Procurement 101 provides a basic procurement overview. The Procurement 101 presentation provides an overview of the procurement business processes and regulations. Learn what governs us all when you visit our Regulations and Ethics page.

[Enter HERE](#)

Link to Agency Procurement Library

Quickly get the guides, forms and templates that you want.

Quick access to all procurement guides, forms and templates catalogued in alphabetic order.

[Enter the Library HERE](#)

Link to Agency Procurement Club

Procurement Club resources are available to all agency procurement professionals.

You're already a Club Member!

[Enter the Club HERE](#)

Welcome to the online Agency Procurement Campus

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Training curriculum based on agency personnel procurement role:

- Pre-Requisite
- Requisition
- Contract Manager
- Procurement & Solicitation Professional
- Leadership

Procurement Curriculum Selection

Choose the Procurement Curriculum/Curriculums that match your Procurement Role/Roles. If your procurement practice is linked to several Curriculums, we suggest that you begin with PROC 101 and then proceed to the curriculums based on most practiced to least practiced.

PROC 201 - Requisitioner

Get best practice materials for understanding the procurement business processes and use of the RIFANS system for procurements.

[Enter HERE](#)

PROC 301 - Contract Manager

Curriculum materials guide users on how to identify contract performance expectations and get best contract performance outcomes.

[Enter HERE](#)

PROC 401 - Procurement & Solicitation Professional

Get best practices for Procurement Processes with an emphasis on the Solicitation process, including helpful resource guides, tips, checklists and forms.

[Enter HERE](#)

PROC 501 - Leadership Level

This curriculum is an introduction to the State's Centralized Purchasing Division and primary procurement information at a high-level.

[Enter HERE](#)

PROCUREMENT LIBRARY

Quickly access all procurement resources at the Library, including all resources in the PROC Curriculum Modules.

Agency Procurement Library


Quickly access Forms, Guides, Templates & Tools. All agency procurement documents are arranged in alphabetic order.

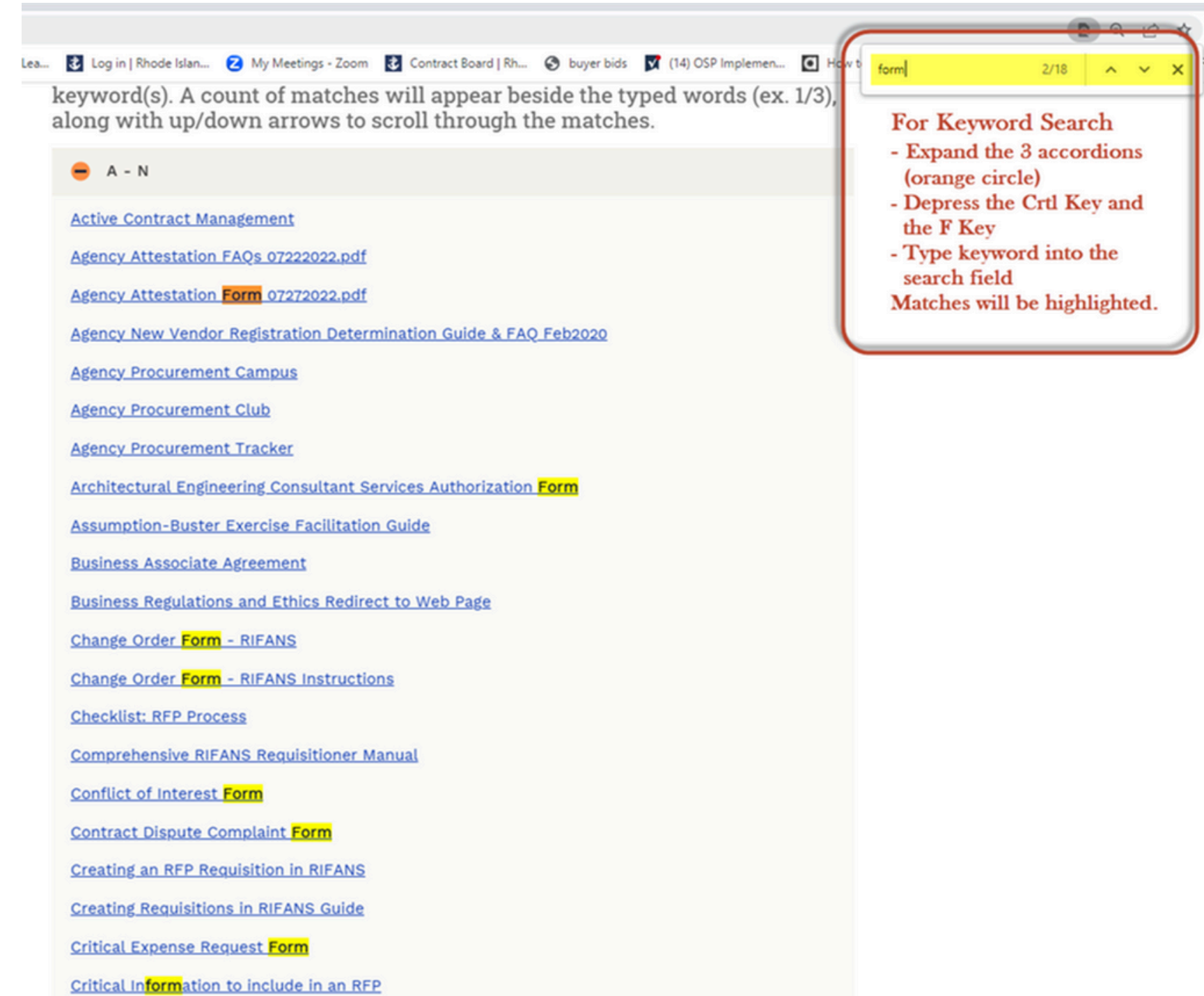
For Alphabetic Search

Click on the alphabetic accordion icons below to expand the document listing for search by document name.


For Keyword Search

To search by keyword, expand the three accordion icons below, press down on the two keys "Control" and "F". A window will pop open for you to type keyword(s). A count of matches will appear beside the typed words (ex. 1/3), along with up/down arrows to scroll through the matches.

-  A - N
-  O & OSP
-  P - Z



keyword(s). A count of matches will appear beside the typed words (ex. 1/3), along with up/down arrows to scroll through the matches.

-  A - N
- [Active Contract Management](#)
- [Agency Attestation FAQs_07222022.pdf](#)
- [Agency Attestation Form_07272022.pdf](#)
- [Agency New Vendor Registration Determination Guide & FAQ Feb2020](#)
- [Agency Procurement Campus](#)
- [Agency Procurement Club](#)
- [Agency Procurement Tracker](#)
- [Architectural Engineering Consultant Services Authorization Form](#)
- [Assumption-Buster Exercise Facilitation Guide](#)
- [Business Associate Agreement](#)
- [Business Regulations and Ethics Redirect to Web Page](#)
- [Change Order Form - RIFANS](#)
- [Change Order Form - RIFANS Instructions](#)
- [Checklist: RFP Process](#)
- [Comprehensive RIFANS Requisitioner Manual](#)
- [Conflict of Interest Form](#)
- [Contract Dispute Complaint Form](#)
- [Creating an RFP Requisition in RIFANS](#)
- [Creating Requisitions in RIFANS Guide](#)
- [Critical Expense Request Form](#)
- [Critical Information to include in an RFP](#)

For Keyword Search

- Expand the 3 accordions (orange circle)
- Depress the Ctrl Key and the F Key
- Type keyword into the search field
- Matches will be highlighted.

CODE OF ETHICS AND PROFESSIONAL BEHAVIOR

*Amanda Rivers, Esquire
Deputy Purchasing Agent*



CODE OF ETHICS AND PROFESSIONAL BEHAVIOR

TITLE 36
Public Officers and Employees

CHAPTER 36-14
Code of Ethics

SECTION 36-14-5

§ 36-14-5 Prohibited activities. – (a) No person subject to this code of ethics shall have any interest, financial or otherwise, direct or indirect, or engage in any business, employment, transaction, or professional activity, or incur any obligation of any nature, which is in substantial conflict with the proper discharge of his or her duties or employment in the public interest and of his or her responsibilities as prescribed in the laws of this state, as defined in § 36-14-7.

(b) No person subject to this code of ethics shall accept other employment which will either impair his or her independence of judgment as to his or her official duties or employment or require him or her, or induce him or her, to disclose confidential information acquired by him or her in the course of and by reason of his or her official duties.

(c) No person subject to this code of ethics shall willfully and knowingly disclose, for pecuniary gain, to any other person, confidential information acquired by him or her in the course of and by reason of his or her official duties or employment or use any information for the purpose of pecuniary gain.

Code of Ethics & Professional Behavior

(i) Advise the state or municipal agency in writing of the existence and the nature of his or her interest in the matter at issue;

(ii) Recuse him or herself from voting on or otherwise participating in the agency's consideration and disposition of the matter at issue; and

(iii) Follow any other recommendations the ethics commission may make to avoid any appearance of impropriety in the matter.

(2) Represent any other person before any state or municipal agency of which he or she is a member or by which he or she is employed.

(3) Act as an expert witness before any state or municipal agency of which he or she is a member or by which he or she is employed with respect to any matter the agency's disposition of which will or can reasonably be expected to directly result in an economic benefit or detriment to him or herself, or any person within his or her family, or any business associate of the person, or any business by which that person is employed or which the person represents.

3.1.C Prohibited activities under the Rhode Island conflict of interest statutes (R. I. Gen. Laws § 36-14-5):

3.1.C.5 No person subject to this code of ethics or spouse (if not estranged) or dependent child or business associate of such person or any business by which said person is employed or which such person represents, shall solicit or accept any gift, loan, political contribution, reward, or promise of future employment based on any understanding that the vote, official action or judgment of said person would be influenced thereby.

CODE OF ETHICS AND PROFESSIONAL BEHAVIOR

3.1.D.1 Universal Code of Ethics applicable to all state employees involved in the procurement process:

3.1.D.2.E Under no circumstances may a vendor provide to a procurement official nor may a purchasing agent accept any goods or services, regardless of monetary value, for personal use for less than fair market value.

3.1.D.2.F Personnel are prohibited from accepting gifts or gratuities in any form for themselves or their families ...from contractors, subcontractors or suppliers...

3.1.D.2.F.(i) Gifts or gratuities shall mean, but are not limited to money, merchandise, advertising media, gift certificates, trips (individually or in groups), cock-tail parties, dinners, evening entertainment, sporting events, etc., and any merchandise carrying a vendor's name or logo

CODE OF ETHICS AND PROFESSIONAL BEHAVIOR

3.1.D.2.G **Social interaction** between personnel involved in the procurement process and any present or prospective contractors, subcontractors or suppliers and their representatives creating the **impression of favoritism shall be avoided**. However, this Procurement Regulations does not prohibit social interactions between state employees and representatives of suppliers which are clearly of a personal nature, in which the parties involved would normally be expected to reciprocate, and in which no reimbursement from the state is sought by the employee. For example, the supplier's representative may be an acquaintance, neighbor, relative or former state employee. The responsibility rests on the individual employee to regulate his/her own actions and to seek advice from Purchasing Management or the Ethics Commission if concerned about an apparent conflict of interest.

CODE OF ETHICS AND PROFESSIONAL BEHAVIOR

- 3.1.D.4.a Resolution of conflict may include, but shall not be limited to, the following measures:
 - reassignment of the procurement official or other state employee involved;
 - termination of employment of the procurement official or other state employee involved; and
 - debarment of any and all vendors who may be involved.
- 3.1.D.9 Purchasing personnel shall not make purchases for personal use in the name of the state or through the use of any state procurement forms



CODE OF ETHICS AND PROFESSIONAL BEHAVIOR

WARNING: State employees are prohibited from bidding on or being awarded a contract with the State of Rhode Island.

220-RICR-30-00-13 General Conditions of Purchase:

13-5. Relationship of Parties - The selected Vendor must be fully qualified and capable in all material respects to provide the specified goods and/or services. Unless specifically provided for in the solicitation, the Vendor shall be an independent contractor and not an employee, agent, partner or joint venturer with the State. Nothing herein shall be construed as creating any contractual relationship or obligation between the State and any sub-bidder, subcontractor, supplier of the Vendor, and/or employee of the Vendor. With that said, the State may consider Vendor non-payment of subcontractors or suppliers in determining whether an award to the Vendor is in the best interest of the State. If the solicitation allows, and the Vendor is a joint entity consisting of more than one individual, partnership or corporation or other business organization, all such entities shall be jointly and severally liable for performing the Contract; however, one entity shall be designated as the lead Vendor for contracting purposes.

RESOURCES

- Purchases' website: www.ridop.ri.gov
- Your Friendly Neighborhood Purchases Procurement Team
 - Administrator of Purchasing Systems
 - Tom Bovis - Construction (and related goods and services)
 - David Francis - Health & Human Services (and related goods and services)
 - Maxwell Righter - Information Technology and General Goods and Services
 - Your assigned Procurement Specialist
 - Purchases' Leadership
- Upcoming Procurement Training Sessions

THANK YOU

Thank You for your time and interest in better understanding the regulatory mandates, ethics, organizational structure, procurement types and business processes of the Division of Purchases.

Nancy McIntyre, State Purchasing Agent
Amanda Rivers, Deputy Purchasing Agent
Meredith Skelly, Deputy Purchasing Agent

