

Vermont Agency of Commerce & Community Development  
Department of Housing & Community Development  
C. Davis Building, 6<sup>th</sup> Floor  
One National Life Drive  
Montpelier, VT 05620-0501

## ***Request for Proposal (RFP):***

### **Assessment, Facilitated Outreach, and Recommendations to Improve the State's Designation Programs**

<b>Key RFP Events</b>	<b>Due Date</b>	<b>Due by– Eastern Time</b>
<b>Issue Date:</b>	<b>February 10, 2023</b>	
<b>Bidder's Conference:</b>	<b>NA</b>	
<b>Questions Due:</b>	<b>February 21, 2023</b>	<b>2:00 PM</b>
<b>Proposals Due:</b>	<b>March 3, 2023</b>	<b>2:00 PM</b>

#### **Accessibility / Accessibilité / Accesibilidad**

Please contact the point of contact below for translation options or accessibility issues.

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Póngase en contacto con el punto de contacto que aparece a continuación para conocer las opciones de traducción o los problemas de accesibilidad.

**Please be advised all notifications, releases, addenda associated with this RFP will be posted at the following website referencing the same RFP title:**

**<https://accd.vermont.gov/about-us/bidding-opportunities>**

*The State will not notify interested parties with updated information. It is the bidder's responsibility to periodically check the web site above for all notifications, releases and addenda pertaining to this RFP.*

State Contact: Michele Snyder  
Email: [Accd.contracts @vermont.gov](mailto:Accd.contracts@vermont.gov)  
Phone: (802) 461-5224



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## 1. OVERVIEW

1.1 **Summary.** As Vermont’s suite of designation programs enters its 25<sup>th</sup> year, and as a result of recent legislation passed by the Vermont General Assembly [Act 182 \(S.226\) of 2022 Sec. 40](#), the Department seeks consulting assistance to conduct statewide stakeholder outreach to support the evaluation of and future improvements to the [State designation programs](#) and incentives established in [24 V.S.A. Chapter 76A](#) that recognize and invest in the vitality of Vermont’s compact settlement areas, including participation by State, regional, municipal, and advocacy and nongovernmental organizations. Consultants need expertise and proven experience in leading stakeholder outreach, meeting facilitation, have deep familiarity with Vermont’s designation, planning and development framework, and national approaches to place-based incentive districts, programs, and policies.

The consultant’s recommendations shall include the following five components:

- **A Stakeholder Engagement and Outreach Plan** both as a standalone tool, and to be applied and adjusted iteratively to each of the other components.
- **A Program Evaluation** including requirements, benefits, impact, challenges, opportunities, and comparative analysis of the current programs, and comparative analysis with other states’ programs.
- **Vision and Goals** for designation reform, considering desired outcomes and drawing from the unique opportunity present to maintain and bolster the existing programs to transformative changes that evolve the programs for the next 25 years.
- **Program Recommendations** tailored to the areas of need—Administrative Processes, Conditions for Success & Program Requirements, Program Benefits & Incentives, Future Program Design—with ranked priorities.
- **Final Report** synthesizing the program components and making final recommendations to the legislature.

1.2 **Contract Period.** Contracts arising from this RFP will be for a period of 8 months. The State anticipates the start date will be April 1, 2023. A mid-term report will be due July 1, 2023, and a final report will be due December 15, 2023.

1.3 **Single Point of Contact.** All communications concerning this RFP are to be addressed in writing to the State Contact listed on the front page of this RFP. Actual or attempted contact with any other individual from the State concerning this RFP is strictly prohibited and may result in disqualification.

1.4 **Bidder’s Conference.** A bidders’ conference will not be held.

1.5 **Question and Answer Period.** Any vendor requiring clarification of any section of this RFP or wishing to comment on any requirement of the RFP must submit specific questions in writing no later than the deadline for question indicated on the first page of this RFP. Questions may be e-mailed to the point of contact on the front page of this RFP. Questions or comments not raised in writing on or before the last day of the question period are thereafter waived. At the close of the question period a copy of all questions or comments and the State’s responses will be posted on the State’s web site <https://accd.vermont.gov/about-us/bidding-opportunities> <http://www.bgs.state.vt.us/pca/bids/bids.php>. Every effort will be made to post this information as soon as possible after the question period ends, contingent on the number and complexity of the questions.

- 1.6 **Changes to this RFP.** Any modifications to this RFP will be made in writing by the State through the issuance of an Addendum to this RFP and posted online at <https://accd.vermont.gov/about-us/bidding-opportunities> . Verbal instructions or written instructions from any other source are not to be considered.
- 1.7 **Assistance.** If a bidder requires assistance in preparing their proposal or needs guidance on socioeconomic certifications, the bidder may contact APEX Accelerator (formerly Procurement Technical Assistance Center / PTAC). APEX Accelerator specializes in helping small businesses navigate the documentation associated with State and Federal procurement. Their website is: <https://accd.vermont.gov/economic-development/programs/ptac>. (The name change is very recent, therefore some of PTAC's websites have not been updated to reflect their new name.)

## 2 SCOPE OF WORK

- 2.1 **Background.** The Vermont Department of Housing and Community Development administers the state [designation programs](#) as a platform to implement planning goals and align policies through place-based regulatory and implementation incentives that recognize and support best practices.

The programs began in 1998 with the establishment of the downtown designation (modeled after the [Main Street America](#) program) and have since grown to five designations with distinct goals, requirements, and benefits over the past 25 years. The designation program includes five unique and complimentary programs: downtowns, village centers, new town centers, growth centers, and neighborhood development areas.

The designation programs serve as a coordinating platform across state agencies and state, regional, and municipal governments for place-based and outcomes-focused revitalization and development. The Vermont Downtown Development [Board](#) confers the designations and there are now more than 260 designated areas throughout the state. These programs have strong support from diverse stakeholders. The state designations currently help Vermont achieve a variety of goals related to land use planning, historic preservation, economic revitalization, smart growth, and economic development goals with a focus on vital community centers and settlement.

The designations offer a common platform to recognize existing and planned compact settlements throughout the State, better coordinate public infrastructure with, manage change, evaluate and grow local capacity and conditions for success, and have therefore been used to assign regulatory and non-regulatory incentives. The state designation programs have served as a proxy for statewide land use planning, recognizing common local conditions, and in some cases and places this has worked well. However, the scope of original, intended outcomes and program incentives has grown over the years, and the way the programs are applied, in practice, are not always coordinated or coherent. As the programs have grown in scope and significance, the Scott administration and General Assembly have expressed increased interest in re-visiting and modernizing the designations to ensure that program administration, design, and aspirations are properly aligned with requirements, incentives, and statewide goals.

- 2.2. **Legislation.** [Act 182 \(S.226\) of 2022, Sec. 40](#)

Recognizing the need to revisit the state designation programs' requirements, structure, incentives, and goals after their nearly quarter-century tenure, the legislature appropriated \$150,000 towards designation reform during its 2022 session. ***It is important to note the full appropriated amount does not represent the value of the contract resulting from this RFP, as a portion of the appropriation is earmarked for ancillary services.*** The following language, taken directly from state statute, makes clear the state's commitment to the designation programs' continued investment in compact settlement areas, while recognizing the need for modernization and future improvements.

Sec. 40. DESIGNATED AREA REPORT; APPROPRIATION

*(a) The sum of \$150,000.00 is appropriated from the General Fund to the Department of Housing and Community Development in fiscal year 2023 for the purpose of hiring a consultant to evaluate the State designation programs established in 24 V.S.A. chapter 76A pursuant to subsection (b) of this section.*

*(b)(1) The Department of Housing and Community Development shall hire an independent consultant to:*

- (A) review and assess the State designation programs and incentives established in 24 V.S.A. chapter 76A that recognize and invest in the vitality of Vermont's compact settlement areas; and*
- (B) conduct statewide stakeholder outreach to support the evaluation of and future improvements to the programs, including participation by State, regional, municipal, and advocacy and nongovernmental organizations.*

*(2) The consultant shall make recommendations on how to:*

- (A) objectively define and map existing compact settlements as a basis for broader recognition;*
- (B) improve the consistency between and among regional plans and future land use maps;*
- (C) modernize these programs, including consideration of program reform or consolidation;*
- (D) make the designation programs and associated benefits more accessible to municipalities;*
- (E) apply regulatory and nonregulatory benefits;*
- (F) strengthen designation and incentives as a platform for place-based economic development, climate action, complete streets, and equity and efficiency of public investment and service delivery;*
- (G) implement the [smart growth principles](#) established by 24 V.S.A. § 2791; and*
- (H) achieve the goals established in 24 V.S.A. § 4302.*

*(3) On or before July 15, 2023, the consultant shall submit a written report to the General Assembly with its findings and any recommendations for legislative action.*

**2.3 Project Objectives.** The project goals are:

- Improve consistency between and among the state designations programs.
- Improve consistency and alignment between designation programs and regional plans and future land use maps, corresponding with statewide initiatives to improve and coordinate the effectiveness of local, regional, and state planning, mapping, and community development;
- Make the state designation programs and associated benefits more accessible to diverse municipalities, appropriately scaled to municipal capacity;
- Improve designations as a platform for regulatory and nonregulatory benefits;
- Strengthen state designation and incentives as a platform for place-based economic development and emerging priorities, including climate action, complete streets, and equity and efficiency of public investment and service delivery, and tax policy;
- Modernize the programs, including potential consolidation to make them more efficient and effective in program delivery and impact toward advancing the stated goals and objectives;
- Develop recommendations for near-term and easier-to-achieve changes to the program, as well as recommendations for major reforms that prepare the program for the next 25 years;
- Implement the smart growth principles established by 24 V.S.A. [§ 2791](#); and
- Achieve the goals established in 24 V.S.A. [§ 4302](#).

2.4 **Project Management.** DHCD will manage the project with oversight and periodic review from an advisory team consisting of key partners.

2.5 **Bidder Qualifications.** Consulting teams are expected to have proven expertise in the following areas:

- Program Evaluation
- Stakeholder Engagement and Meeting Facilitation
- Vermont Planning Act
- Act 250 Policy and Administration
- Municipal Implementation Tools for Community Development
- Outreach in rural Northern New England
- GIS and Mapping
- Vermont and national place- and development-outcome based incentive programs.
- Expertise in National Main Street and/or Downtown Revitalization incentive programs
- Experience conducting outreach, facilitation, and document production from a Diversity, Equity, Inclusion, and Accessibility (DEIA) perspective.
- Communications, graphic design, and producing comprehensive, digestible reports.

2.6 **Tasks.** The consultant team shall conduct an evaluation of the current designation program structure, processes, and partnerships. The evaluation shall include:

- Review of each designation program and relevant program material;
- Review and compare with similar programs from other states and national organizations;
- Conduct stakeholder interviews, targeted on-line surveys, and/or focus groups;
- And apply other appropriate methods to obtain the necessary information and data to develop sound recommendations.

The evaluation shall be used to develop recommendations that, at minimum, identify areas for improved efficiencies and effectiveness within the designation program structure and project management process, as well as programmatic improvements to further support the state's land use and development goals and priorities.

2.6.1 **Task 0: Project Initiation, Management & Execution.** The project consultant must ensure that the project meets all milestones and schedules. The consultant will be responsible for coordinating the activities of any consultants who will receive sub-grants, and will be involved in the project, such as stakeholder engagement. The consultant will be expected to:

- Develop a project management plan, which outlines the schedule for completing the scope of work and deliverables.
- Schedule and facilitate bi-weekly check in meetings to coordinate activities and tasks with DHCD, and provide progress updates. Engage, coordinate, and collaborate with DHCD to review and inform the designation reform approach and work on an on-going basis.

- Coordinate and manage all activities of sub-consultants, including stakeholder engagement.

**Task 0: Deliverables & Reporting.** All deliverables must be in hard copy and digital formats. Also, the consultant shall provide the editable files (.docs, .xls, .psd, .indd, etc.) for all reports and materials.

- Designation reform project management plan that includes the approach, timeline for completing project tasks, and stakeholder engagement budget.
- Schedule and facilitate bi-weekly check-in meetings with DHCD.
- Monthly progress reports on reform evaluation, stakeholder engagement, and recommendation development.

## 2.6.2

**Task 1: Stakeholder Engagement.** The consultant will develop a comprehensive stakeholder engagement plan to be incorporated into each phase of the scope of work. The purpose of Stakeholder Engagement is to support a thorough and inclusive program evaluation, to engage past, present, and future program participants in the review process, and to use stakeholder feedback continually and iteratively to equitably inform the final designation recommendations.

The stakeholder engagement plan should be based on inclusive and accessible methods for reaching a diverse range of constituents, backed by proven experience, as well as a timeline for each stage of engagement. Attention will be given to ensure that a diverse range of traditional and nontraditional stakeholders are consulted and engaged, including the BIPOC community, small-scale developers, small business owners, and rural communities.

The methods developed by the consultant shall be applied to each subsequent task, adjusting and amending the stakeholder engagement plan according to lessons learned and best practices that arise. The consultant shall use the most appropriate stakeholder engagement tools for each phase of the scope of work, which may include but is not limited to surveys, focus groups, one-on-one interviews, and outreach and promotional materials.

The project will engage the following list of stakeholders (which is not comprehensive):

- Vermont Downtown Board
- State Regulating Agencies & Funding Agencies for Planning, Development & Revitalization
- Agency of Transportation
- Buildings & General Service
- Division of Fire Safety
- Agency of Natural Resources
- Natural Resources Board
- Municipal Governments and the Vermont League of Cities and Towns
- Vermont Planners and Planning Association
- Vermont Association of Planning & Development Agencies

- Real Estate Investment & Development Community
- Vermont Housing & Conservation Board
- Affordable Housing Community
- Environmental Organizations & Smart Growth Advocates
- Downtown Organizations & Nonprofits
- Historic Preservation Communities and Preservation Trust of Vermont
- Business Community
- Hospitals (required by ACA to conduct a community health needs assessment every 3 years)
- End Users, including past applicants, current designation holders, and potential applicants and end users from a range of community sizes and with varying capacities
- Program Administrators and Staff, past and current
- Others, to be determined by the consultant in conjunction with the DHCD Project Management Team

#### 2.6.2.1 Sub-Task: Stakeholder Engagement

- **Stakeholder Identification** in consultation with Project Management Team and Project Advisory Team
- Outreach and evaluation of the **local conditions for proven success** in diverse communities
  - ❖ Plans & regulatory conditions
  - ❖ Infrastructure & facilities
  - ❖ Administrative structures/capacity/processes
  - ❖ Capital investments
  - ❖ People investments
  - ❖ Stimulation of local economy
  - ❖ Unemployment rates
- Outreach and evaluation of **State government conditions for proven success**
  - ❖ State goals & policy implementation
  - ❖ Cross-government & cross-agency planning, regulatory, and implementation coordination partnership
- Planning
- Regulations/regulatory recognition
- Funding
- Tax benefits



- Technical assistance
- Management of stakeholder stipends at the guidance of DHCD staff

**Task 1: Deliverables & Reporting.** The deliverables must include a plan for actionable strategies across multiple outreach methods, with digital files in Microsoft Word and Adobe PDF.

- Draft of stakeholder engagement plan for DHCD staff approval
- Stakeholder engagement plan and timeline, including purpose and goals for conducting stakeholder engagement
- Implementation of stakeholder engagement plan
- Summary of stakeholder engagement outcomes

### 2.6.3

**Task 2: Program Evaluation.** The Program Evaluation will serve as a deep-dive research phase into the designation programs’ origins, purposes, successes, weaknesses, and potential. The purpose of the Evaluation is to provide the consultant with the necessary background, context, comparative framework, and understanding of benefits and criticisms to make well-informed, context-sensitive recommendations for designation reform.

A key outcome of this task will be to develop a framework by which to effectively evaluate the designation programs. The consultant will expand on the basic framework provided below, using their expertise and professional judgment to guide development of criteria. Once the framework is developed, deliverables for Tasks 2 – 5 shall each utilize the framework to maintain consistency and evaluation integrity

**Basic Evaluation Framework:** The need for reform is multifaceted across these areas of inquiry, which provide a basic framework for evaluation for the consultant to expand upon:

- **Administrative Processes:** For both the customer (municipalities, developers, RPCs, and local volunteers) and the program staff (DHCD), a closer examination is needed at the administrative burden of applying for, managing, and renewing the current designation programs. Is the current process best serving front and back-end users, efficient and/or effective in program delivery, or is the current framework hindering efficient program management?
- **Conditions for Success & Program Requirements:** What does success look like for the state designation programs, at both the municipal and state levels? As development, regulatory burdens, and program interpretation have evolved over the designation programs’ 25-year tenure, are program requirements best aligned with capacity, incentives, and outcomes?
- **Program Benefits & Incentives:** Does the program design support the prevailing state and local land use, community development, and smart growth needs and goals? What are near- and long-term needs? How can benefits and incentives be best aligned to support needs and conditions for success?
- **Future Program Design:** Across all three areas of reform, how could the programs evolve—by expanding program constituency, partnerships, incentives, requirements, technical assistance, capacity building, etc.—to re-envision the

purpose, need, process, and potential of the state designation programs for the next 20 years?

Within these topics of evaluation, the framework should be responsive and functional for a variety of variables affecting success, such as the:

- **Current and emerging priorities** (such as: climate resilience, housing development, health equity, multi-modal transportation and transit-oriented development, etc.)
- **Economic changes** anticipated in the next 25 years (such as: online & large-format retail shifts, experiential spending, tourism demographic change and housing needs, telecommuting and employment, climate migration, transportation technology, etc.)
- **Equity considerations** (i.e., Is there equitable access to the designations and their benefits for all communities regardless of factors such as socioeconomic status or municipal capacity? And, are the programs designed to ensure that the communities plan for and encourage equitable access to housing and economic development opportunities?)
- **Intended development focus** (such as: preservation, revitalization, adaptive re-use/redevelopment, and settlement expansion);
- **Degrees of intended change** (such as: sustain, evolve, or transform);
- **Degrees of difficulty** associated with an outcome (such as: beginner, intermediate, advanced);
- **Place-types** (such as: central business districts, primary centers, secondary centers, walkable neighborhoods, mixed-use corridors, strip development/commercial corridors, special use areas, etc.);
- **Physical conditions** (such as: the provision of development-enabling infrastructure/facilities or the presence of ecosystem services resources)
- **Placed-based administrative conditions** necessary for success (plans, regulations, capital programming, budgeting/fiscal capacity, enterprise management, inter-governmental cooperation, the provision of services, and/or staffing/volunteer capacity); and
- **Benefits type focus** (such as: taxation, state program eligibility, state program priority, direct technical assistance, fee relief, enabled or delegated municipal authority, applicability of state regulations, etc.);
- **Benefits eligibility focus** (such as: boundary-based, program-based, and/or criteria/menu-based);
- **Programmatic best practices** (pre-application assistance, application, review, decision, post-decision assistance, monitoring, and renewal)
- **Evaluation of the program's** nomenclature to make the program more easily understood.

### 2.6.3.1 Sub-Task - Program Evaluation

- Review legislative statute and all existing designation program materials, including the state’s planning manual, designation program guidelines and material, evaluations of other state grant programs and other supporting documentation.
- Connect with and interview existing customers (“end-users”), both current designation holders and past applicants from all five designation programs, to answer the following question: how are the existing programs being managed, supported, resourced, and incentivized?
- Develop a framework for program evaluation following the basic approach provided above.
- Case Studies: Conduct an assessment of a minimum of five (5) other place-based incentives programs, including at least two (2) state designation programs (including Michigan), and other comparable Main Street or development-ready places programs. This review must examine the way such programs are structured and organized, staffed and managed, funded and supported, local management structures, program oversight/quality control and program monitoring processes, inclusive of metrics. The case study must demonstrate how successful programs have been executed in other states and regions, which strategies and program delivery approaches have helped sustain momentum and innovation, and areas or key issues where states have faced challenges.
- Conduct a comparative analysis of Vermont’s state designation programs with the other state programs surveyed in the case studies.

**Task 2 – Deliverables & Reporting.** Deliverables will be accessible as digital and editable files in Microsoft Word, Adobe InDesign and/or Adobe PDF with high-quality graphics.

- An evaluation Framework, to be presented both in graphic or matrix form, and with detailed written descriptions of all evaluation criteria. The framework will draw on comparative analysis of best practices, case studies, and stakeholder engagement, and is not limited to the criteria listed here.
- Minimum of five case studies, presented in a graphic-rich format and highlighting strengths, challenges, and opportunities of other place-based incentive programs, with a focus on strategy and program delivery.
- Findings from comparative analysis of other place-based state incentive programs, presented as both written content as well as mapped as a matrix of how these other state programs incentivize, manage, resource, and support the programs.
- Implementation of stakeholder engagement plan.

**2.6.4 Task 3 - Vision, Outcomes and Measurement.** The goal of this task is to determine what success looks like for the designation programs, to identify concrete outcomes for existing programs, to create a goal-oriented vision for what reformed designation programs could look like, and to define measurement metrics for evaluating success. The purpose of visioning is to provide a bridge between evaluation (where the program is now) to recommendations (where the program is headed). The stakeholder engagement tasks will inform and be critical to the success in developing the vision, goals, outcomes, and metrics.

- Create a vision statement for the designation programs
- Re-define desired program outcomes and program delivery
- Establish metrics for evaluating progress and success toward program outcomes

### **Task 3 – Deliverables and Reporting**

- Draft of formal vision statements, outcomes, and success metrics to be reviewed by the DHCD team and drawing from engagement on emerging priorities and economic trends.
- Formal vision statements, outcomes, and success metrics for each category of the framework created in Task 2.
- Metrics of Success. Detailed framework for program measurement including what success means for the designation programs, and how to measure and track success.
- Implementation of stakeholder engagement plan

#### **2.6.5**

**Task4 - Recommendations.** The purpose of this task is to actualize the evaluation and visioning phases into tangible recommendations for program reform across the identified areas of inquiry and implementation phases, using the framework developed in Task 2.

- **Develop Recommendations.** Recommendations should consider consolidation of programs, regulatory and non-regulatory benefits, and separation of Main Street programs from the other incentives. *Recommendations should be strategic, actionable and should include but not be limited to the following areas of inquiry:*
- **Administrative Processes.** Review and develop recommendations for components of the administrative process, including:
  - Pre-application process & support
  - Outreach and technical assistance
  - Application & review process
  - Monitoring & renewal process
  - Post-designation support and local technical assistance tailored to community capacity
- **Program Requirements & Incentives.** Review and develop recommendations for program requirements and incentives, including:
  - Reform and/or consolidation of existing programs
  - Designations, requirements, and incentives including approaches that factor in:
    - ❖ Intended development focus
    - ❖ Degrees of intended change
    - ❖ Degrees of difficulty
    - ❖ Place-types
    - ❖ Physical conditions

- ❖ Placed-based administrative conditions
- ❖ Benefits type focus
- ❖ Benefits eligibility focus
- Regulatory and non-regulatory benefits types and focus, which may include lower-barrier and menu-oriented or an incremental tiered approach to incentives depending on program framework
- Pathways and articulation tables for existing designations to adapt and transition
- **Future Program Design.** Review and develop recommendations for bigger picture future program design changes both structural and outcome-oriented, such as:
  - Designations that effectively repair sprawl and strip development and growth/expansion into undeveloped areas
  - Options to address the issue of flood-prone centers
  - Improved integration with local and regional future land use transects
  - Expanding program constituency, including attention to Diversity, Equity & Inclusion (DEI) in the program goals and outcomes
  - Cross-agency administration and program delivery
  - Priority funding sites (i.e. designation of critical sites for redevelopment within a designated area or an area eligible for designation: resorts, hospitals, educational campuses, airports, legacy brownfields, or advanced manufacturing hubs)
  - Alternative incentive-based program structures (Main Street Ready, Re-development Ready, New-Development Ready, Working Lands Ready, Climate Ready, etc.)
  - Methodology to map and identify existing land use (or characteristic place types) assessing scales and intensity of statewide and regional significance for regulatory recognition and targeted investments in revitalization, redevelopment, and smart growth & expansion, which may include a focus on:
    - ❖ Primary civic and commercial centers and main streets
    - ❖ Secondary centers (villages, neighborhood hubs/crossroads/hamlets)
    - ❖ Neighborhoods & areas adjacent to centers
    - ❖ Major transit corridors, adapting strip development & complete arterial streets
    - ❖ Edge areas & greenfields
    - ❖ Special Enterprise Places (resorts & recreation hubs, hospitals, colleges, airports, etc.)
    - ❖ Working lands farmsteads and enterprises

- **Implementation Phases.** Additionally, recommendations shall be made for multiple phases of implementation, both near- and long-term:
  - **Phase 1: Housekeeping Improvements.** Quick fixes, simple solutions (aka “low-hanging fruit”) and short-term interventions intended to improve the program structure with minimal changes and staff capacity demands
  - **Phase 2: Modernization.** Broader reform intended to modernize the programs’ structure, goals and objectives, and delivery.

**Task 4 – Deliverables and Reporting.** Recommendations deliverables will include digital files in Microsoft Word, Adobe PDF, and Adobe InDesign, as applicable, including:

- A legislation-ready outline of recommended changes to the designation program for Legislative Counsel staff.
- In-depth recommendations to improve and modernize the state designation programs according to the developed criteria and evaluation framework, including program delivery, administration, and management practices for program staff to follow and implement.
- Implementation and transition plan, including a detailed timeline with short-term fixes (immediate improvements to maintain existing programs) and longer-term reforms to modernize the designation program.
- Marketing, outreach, and communications plan and materials to accompany the transition of the state designation program to its new form and framework.
- Implementation of stakeholder engagement plan

#### 2.6.6

**Task 5 - Final Report.** The purpose of this task is to communicate findings with a wider audience – municipalities, legislators, state-wide planning stakeholders – in an easily digestible and accessible way. The report and associated outreach materials should be high-level, non-technical, appropriate for a layperson, void of jargon, and should include high-quality graphics throughout.

- Create a high-level report outline
- Develop a draft report and corresponding executive summary
- Develop a final report with corresponding executive summary
- Develop an engaging presentation, and present findings to the stakeholders
- Solicit feedback on the draft outline and report from the DHCD Project Management Team and Project Advisory Committee, allowing at least one round of edits per draft.

**Task 5 Deliverables and Reporting.** Task 5 deliverables will include editable and final design files, in both Microsoft Word, Microsoft PowerPoint, Adobe PDF, and Adobe InDesign formats, as applicable.

- Final report outline
- Draft final report. The final report must include, at minimum:

- Brief history on each designation’s establishment, purposes, and impacts
- Strengths and friction points for each designation
- Recommendations to improve each of the designation programs
- Summary report of outreach efforts conducted
- Final report
- Final presentation of findings and recommendations to stakeholder group
- Executive Summary in graphic rich, accessible, and user-friendly format
- Outreach and promotional materials to present report findings to interested parties, which may include PowerPoint materials, websites, videos, and other materials

## 2.7 *Resources and Reference Materials.*

- [State Designation Program Website](#)
- [State Designation Program Module](#)
- [State Designation Program Benefits Matrix](#)
- [Title 24 Chapter 76A](#)

## 3. GENERAL REQUIREMENTS

- 3.1. **Pricing.** Bidders must price the terms of this solicitation at their best pricing. Any and all costs that Bidder wishes the State to consider must be submitted for consideration. If applicable, all equipment pricing is to include F.O.B. delivery to the ordering facility. No request for extra delivery cost will be honored. All equipment shall be delivered assembled, serviced, and ready for immediate use, unless otherwise requested by the State.
- 3.1.1. Prices and/or rates shall remain firm for the initial term of the contract. The pricing policy submitted by Bidder must (i) be clearly structured, accountable, and auditable and (ii) cover the full spectrum of materials and/or services required.
- 3.1.2. *Cooperative Agreements.* Bidders that have been awarded similar contracts through a competitive bidding process with another state and/or cooperative are welcome to submit the pricing in response to this solicitation.
- 3.2. **Statement of Rights.** The State shall have the authority to evaluate Responses and select the Bidder(s) as may be determined to be in the best interest of the State and consistent with the goals and performance requirements outlined in this RFP. The State of Vermont reserves the right to obtain clarification or additional information necessary to properly evaluate a proposal. Failure of vendor to respond to a request for additional information or clarification could result in rejection of that vendor's proposal. To secure a project that is deemed to be in the best interest of the State, the State reserves the right to accept or reject any and all bids, in whole or in part, with or without cause, and to waive technicalities in submissions. The State also reserves the right to make purchases outside of the awarded contracts where it is deemed in the best interest of the State.
- 3.2.1. *Best and Final Offer (BAFO).* At any time after submission of Responses and prior to the final selection of Bidder(s) for Contract negotiation or execution, the State may invite Bidder(s) to provide a BAFO. The state reserves the right to request BAFOs from only those Bidders that meet the minimum qualification requirements and/or have not been

eliminated from consideration during the evaluation process.

3.2.2. *Presentation.* An in-person or webinar presentation by the Bidder may be required by the State if it will help the State's evaluation process. The State will factor information presented during presentations into the evaluation. Bidders will be responsible for all costs associated with providing the presentation.

3.3. ***Worker Classification Compliance Requirements.*** In accordance with Section 32 of The Vermont Recovery and Reinvestment Act of 2009 (Act No. 54), Bidders must comply with the following provisions and requirements.

3.3.1. *Self-Reporting:* For bid amounts exceeding \$250,000.00, Bidder shall complete the appropriate section in the attached Certificate of Compliance for purposes of self-reporting information relating to past violations, convictions, suspensions, and any other information related to past performance relative to coding and classification of workers. The State is requiring information on any violations that occurred in the previous 12 months.

3.3.2. *Subcontractor Reporting:* For bid amounts exceeding \$250,000.00, Bidders are hereby notified that upon award of contract, and prior to contract execution, the State shall be provided with a list of all proposed subcontractors and subcontractors' subcontractors, together with the identity of those subcontractors' workers compensation insurance providers, and additional required or requested information, as applicable, in accordance with Section 32 of The Vermont Recovery and Reinvestment Act of 2009 (Act No. 54). This requirement does not apply to subcontractors providing supplies only and no labor to the overall contract or project. This list **MUST** be updated and provided to the State as additional subcontractors are hired. A sample form is available online at <http://bgs.vermont.gov/purchasing-contracting/forms>. **The subcontractor reporting form is not required to be submitted with the bid response.**

3.4. ***Executive Order 05-16: Climate Change Considerations in State Procurements.*** For bid amounts exceeding \$25,000.00 Bidders are requested to complete the Climate Change Considerations in State Procurements Certification, which is included in the Certificate of Compliance for this RFP.

After consideration of all relevant factors, a bidder that demonstrates business practices that promote clean energy and address climate change as identified in the Certification, shall be given favorable consideration in the competitive bidding process. Such favorable consideration shall be consistent with and not supersede any preference given to resident bidders of the State and/or products raised or manufactured in the State, as explained in the Method of Award section. But, such favorable consideration shall not be employed if prohibited by law or other relevant authority or agreement.

3.5. ***Method of Award.*** Awards will be made in the best interest of the State. The State may award one or more contracts and reserves the right to make additional awards to other compliant bidders at any time if such award is deemed to be in the best interest of the State. All other considerations being equal, preference will be given first to resident bidders of the state and/or to products raised or manufactured in the state, and then to bidders who have practices that promote clean energy and address climate change, as identified in the applicable Certificate of Compliance.

3.5.1. *Evaluation Criteria.* Consideration shall be given to the Bidder's project approach and methodology, qualifications and experience, ability to provide the services within the defined timeline, cost, and/or success in completing similar projects, as applicable, and to the extent specified below.



Criteria	Consideration
Consultant Qualifications & Experience with Similar Projects	35%
Creative & Comprehensive Approach to the scope of work	35%
Project Timeline	15%
Consultant Costs and Fee Schedule	15%

- 3.6. **Contract Negotiation.** Upon completion of the evaluation process, the State may select one or more Vendors with which to negotiate a contract, based on the evaluation findings and other criteria deemed relevant for ensuring that the decision made is in the best interest of the State. In the event State is not successful in negotiating a contract with a selected Vendor, the State reserves the option of negotiating with another Vendor, or to end the proposal process entirely.
- 3.7. **Cost of Preparation.** Bidder shall be solely responsible for all expenses incurred in the preparation of a response to this RFP and shall be responsible for all expenses associated with any presentations or demonstrations associated with this request and/or any proposals made.
- 3.8. **Contract Terms.** The selected bidder(s) will be expected to sign a contract with the State, including the Standard Contract Form and Attachment C as attached to this RFP for reference. If IT Attachment D is included in this RFP, terms may be modified based upon the solution proposed by the Bidder, subject to approval by the Agency of Digital Services.
- 3.8.1. **Business Registration.** To be awarded a contract by the State of Vermont a vendor (except an individual doing business in his/her own name) must be registered with the Vermont Secretary of State's office <http://www.sec.state.vt.us/tutor/dobiz/forms/fcregist.htm> and must obtain a Contractor's Business Account Number issued by the Vermont Department of Taxes <http://tax.vermont.gov/>.
- 3.8.2. The contract will obligate the bidder to provide the services and/or products identified in its bid, at the prices listed.
- 3.8.3. **Payment Terms.** All invoices are to be rendered by the Contractor on the vendor's standard billhead and forwarded directly to the institution or agency ordering materials or services and shall specify the address to which payments will be sent. Payment terms are Net 30 days from receipt of an error-free invoice with all applicable supporting documentation. Percentage discounts may be offered for prompt payments of invoices; however, such discounts must be in effect for a period of 30 days or more in order to be considered in making awards.
- 3.8.4. **Quality.** If applicable, all products provided under a contract with the State will be new and unused, unless otherwise stated. Factory seconds or remanufactured products will not be accepted unless specifically requested by the purchasing agency. All products provided by the contractor must meet all federal, state, and local standards for quality and safety requirements. Products not meeting these standards will be deemed unacceptable and returned to the contractor for credit at no charge to the State.

**4. CONTENT AND FORMAT OF RESPONSES:** The content and format requirements listed below are the minimum requirements for State evaluation. These requirements are not intended to limit the content of a Bidder's proposal. Bidders may include additional information or offer alternative solutions for the State's

consideration. However, the State discourages overly lengthy and costly proposals, and Bidders are advised to include only such information in their response as may be relevant to the requirements of this RFP. At a minimum, the bid response will include a Cover Letter, Technical Response, Certificate of Compliance and Price Proposal.

4.1. **Cover Letter.**

- 4.1.1. **Confidentiality.** To the extent your bid contains information you consider to be proprietary and confidential, you must comply with the following requirements concerning the contents of your cover letter and the submission of a redacted copy of your bid (or affected portions thereof).
- 4.1.2. All responses to this RFP will become part of the contract file and will become a matter of public record under the State’s Public Records Act, 1 V.S.A. § 315 et seq. (the “Public Records Act”). If your response must include material that you consider to be proprietary and confidential under the Public Records Act, your cover letter must clearly identify each page or section of your response that you consider proprietary and confidential. Your cover letter must also include a written explanation **for each marked section** explaining why such material should be considered exempt from public disclosure in the event of a public records request, pursuant to 1 V.S.A. § 317(c), including the prospective harm to the competitive position of the bidder if the identified material were to be released. Additionally, you must include a redacted copy of your response for portions that are considered proprietary and confidential. Redactions must be limited so that the reviewer may understand the nature of the information being withheld. It is typically inappropriate to redact entire pages, or to redact the titles/captions of tables and figures. Under no circumstances may your entire response be marked confidential, and the State reserves the right to disqualify responses so marked.
- 4.1.3. Exceptions to Contract Terms and Conditions. If a Bidder wishes to propose an exception to any terms and conditions set forth in the Standard Contract Form and its attachments, such exceptions must be included in the cover letter to the RFP response. Failure to note exceptions when responding to the RFP will be deemed to be acceptance of the State contract terms and conditions. If exceptions are not noted in the response to this RFP but raised during contract negotiations, the State reserves the right to cancel the negotiation if deemed to be in the best interests of the State. Note that exceptions to contract terms may cause rejection of the proposal.

4.2. **Technical Response.** In response to this RFP, Bidder shall address the following:

- 4.2.1. Provide details concerning your form of business organization, company size and resources.
- 4.2.2. Describe your capabilities, relevant experience and approach to fulfilling the RFP requirements. Please identify all current or past State projects.
- 4.2.3. Identify the names of all subcontractors you intend to use, the portions of the work the subcontractors will perform, and address the background and experience of the subcontractor(s).

4.3. **References.** Provide the names, addresses, and phone numbers of at least three companies with whom you have transacted similar business in the last 24 months. You must include contact names who can talk knowledgeably about performance.

4.4. **Reporting Requirements.** Provide a sample of any reporting documentation that may be applicable to the Detailed Requirements of this RFP.

- 4.5. **Certificate of Compliance.** This form must be completed and submitted as part of the response for the proposal to be considered valid.
- 4.6. **Price Proposal.** Bidders shall submit their pricing information in the Price Schedule attached to the RFP.

## 5. SUBMISSION INSTRUCTIONS:

- 5.1. **Closing Date.** Bids must be received by the State by the due date specified on the front page of this RFP. Late bids will not be considered.
  - 5.1.1. The State may, for cause, issue an addendum to change the date and/or time when bids are due. If a change is made, the State will inform all bidders by posting at the webpage indicated on the front page of this RFP.
  - 5.1.2. There will not be a public bid opening. However, the State will record the name, city and state for any and all bids received by the due date. This information is available upon request to the single point of contact identified on the cover of this RFP..
- 5.2. **Bid Delivery Instructions.** All bid proposals must be submitted in digital format as described below. No hard copies, faxes or in-person delivery will be accepted.
  - 5.2.1. Please submit proposals electronically via email to [ACCD.Contracts@vermont.gov](mailto:ACCD.Contracts@vermont.gov) Bids must be received by the closing date and tie found on the cover of this RFP
  - 5.2.2. The email subject line must read **“Designation RFP – Bid Proposal”**
  - 5.2.3. The email must contain a PDF attachment of the bid OR contain a viable download link.
  - 5.2.4. The bid document must be a single digitally searchable PDF with the following naming convention **<<Vendor Name-Designation Bid>>**. The PDF attachment must contain all components of the bid. Multiple emails and/or multiple attachments will not be accepted.

## 6. BID SUBMISSION CHECKLIST: For your convenience, the following check list identifies required documents for submission:

- ✓ Cover Letter
- ✓ Technical Response (and if applicable, Redacted Technical Response)
- ✓ Signed Certificate of Compliance
- ✓ Price Schedule
- ✓ References

## 7. ATTACHMENTS:

- 7.1 Certificate of Compliance Form *(Required with Bid Submission)*
- 7.2 Price Schedule *(Required with Bid Submission)*
- 7.3 Sample State of Vermont Contract Document *(Consists of the following sections\*)*
  - \* State of Vermont Standard Contract for Services
  - \* Attachment A – Scope of Work
  - \* Attachment B – Payment Provisions

- \* Attachment C – Standard State Provisions for Contracts & Grants
  - \* Attachment D – Additional State Provisions for Contracts & Grants
  - \* Appendix 1 – Performance Measures & Evaluation
  - \* Exhibit 1 - Worker Classification Compliance Requirement; Subcontractor Reporting Form
- The sample contract document is provided to afford the bidder awareness and understanding of the State's contract format, terms, conditions and standard provisions required of the awarded bidder. Be advised, some of the terms, conditions and provisions may impact the bidder's proposal. For example (though not exclusively), "Attachment C – Standard State Contract Provisions for Contracts & Grants" outlines the insurance requirements the awarded vendor will need to procure.*

## CERTIFICATE OF COMPLIANCE

*This form must accompany your Bid.*

**For a bid to be considered valid, this form must be completed in its entirety, executed by a duly authorized representative of the bidder, and submitted as part of the response to the proposal.**

1. **NON-COLLUSION:** Bidder hereby certifies that the prices quoted have been arrived at without collusion and that no prior information concerning these prices has been received from or given to a competitive company. If there is sufficient evidence to warrant investigation of the bid/contract process by the Office of the Attorney General, bidder understands that this paragraph might be used as a basis for litigation.
  
2. **CONTRACT TERMS:** Bidder hereby acknowledges they have read, understand, and agree to the terms of this RFP, including the terms outlined in the sample State of Vermont Standard Contract for Services and associated attachments:
  - 2.1. Bidder agrees to procure and maintain throughout contract duration, insurance in compliance with the minimum provisions set forth in Section 2.5 herein and Section 8 of [Attachment C - State of Vermont's Standard Provisions for Contracts and Grants contained in the sample contract attached hereto.](#)
  - 2.2. Bidder (except an individual doing business in his/her own name) agree to register with the Vermont Secretary of State's office <https://sos.vermont.gov/corporations/registration/>
  - 2.3. Bidder agrees to obtain a Contractor's Business Account Number issued by the Vermont Department of Taxes <http://tax.vermont.gov/>.

3. **ADDENDA:** Acknowledge receipt of Addenda associated with this RFP:

Addendum No.:	_____	Dated:	_____
Addendum No.:	_____	Dated:	_____
Addendum No.:	_____	Dated:	_____

4. **VERMONT TAX CERTIFICATE:** To meet the requirements of Vermont Statute 32 V.S.A. § 3113, by law, no agency of the State may enter into, extend or renew any contract for the provision of goods, services or real estate space with any person unless such person first certifies, under the pains and penalties of perjury, that he or she is in good standing with the Department of Taxes. A person is in good standing if no taxes are due, if the liability for any tax that may be due is on appeal, or if the person is in compliance with a payment plan approved by the Commissioner of Taxes, 32 V.S.A. § 3113

In signing this bid, the bidder certifies under the pains and penalties of perjury that the individual or company is in good standing with respect to, or in full compliance with a plan to pay, any and all taxes owed the State of Vermont.

5. **WORKER CLASSIFICATION COMPLIANCE REQUIREMENT:** In accordance with Section 32 of The Vermont Recovery and Reinvestment Act of 2009 (Act No. 54), the following provisions and requirements apply to Bidder when the amount of its bid exceeds \$250,000.00.
  - 5.1 **Self-Reporting.** Bidder hereby self-reports the following information relating to past violations, convictions, suspensions, and any other information related to past performance relative to coding

and classification of workers, that occurred in the previous 12 months.

Summary of Detailed Information	Date of Notification	Outcome

5.2 **Subcontractor Reporting.** Bidder hereby acknowledges and agrees that if it is a successful bidder, prior to execution of any contract resulting from this RFP, Bidder will provide to the State a list of all proposed subcontractors and subcontractors’ subcontractors, together with the identity of those subcontractors’ workers compensation insurance providers, and additional required or requested information, as applicable, in accordance with Section 32 of The Vermont Recovery and Reinvestment Act of 2009 (Act No. 54), and Bidder will provide any update of such list to the State as additional subcontractors are hired. Bidder further acknowledges and agrees that the failure to submit subcontractor reporting in accordance with Section 32 of The Vermont Recovery and Reinvestment Act of 2009 (Act No. 54) will constitute non-compliance and may result in cancellation of contract and/or restriction from bidding on future state contracts.

6. **EXECUTIVE ORDER 05 – 16: Climate Change Considerations** in State Procurements Certification. Bidder certifies to the following (Bidder may attach any desired explanation or substantiation. Please also note that Bidder may be asked to provide documentation for any applicable claims):

6.1 Bidder owns, leases or utilizes, for business purposes, space that has received:

- Energy Star® Certification
- LEED®, Green Globes®, or Living Buildings Challenge<sup>SM</sup> Certification
- Other internationally recognized building certification:

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6.2. Bidder has received incentives or rebates from an Energy Efficiency Utility or Energy Efficiency Program in the last five years for energy efficient improvements made at bidder’s place of business. Please explain:

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6.3 Please Check all that apply:

- Bidder can claim on-site renewable power or anaerobic-digester power (“cow-power”). Or bidder consumes renewable electricity through voluntary purchase or offset, provided no such claimed power can be double claimed by another party.
- Bidder uses renewable biomass or biofuel for the purposes of thermal (heat) energy at its place of business.

- Bidder’s heating system has modern, high-efficiency units (boilers, furnaces, stoves, etc.), having reduced emissions of particulate matter and other air pollutants.
- Bidder tracks its energy consumption and harmful greenhouse gas emissions. What tool is used to do this? \_\_\_\_\_
- Bidder promotes the use of plug-in electric vehicles by providing electric vehicle charging, electric fleet vehicles, preferred parking, designated parking, purchase or lease incentives, etc.
- Bidder offers employees an option for a fossil fuel divestment retirement account.
- Bidder offers products or services that reduce waste, conserve water, or promote energy efficiency and conservation. Please explain:

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6.4 Please list any additional practices that promote clean energy and take action to address climate change:

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**7. EXECUTIVE ORDER 02 – 22: Solidarity with the Ukrainian People**

- By checking this box, Bidder certifies that none of the goods, products, or materials offered in response to this solicitation are Russian-sourced goods or produced by Russian entities. If Bidder is unable to check the box, it shall indicate in the table below which of the applicable offerings are Russian-sourced goods and/or which are produced by Russian entities. An additional column is provided for any note or comment that you may have.

Provided Equipment or Product	Note or Comment

**8. BIDDER INFORMATION & CERTIFYING SIGNATURE.**

Vendor Name: \_\_\_\_\_ Contact: \_\_\_\_\_

Address: \_\_\_\_\_ Telephone: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_ Fax: \_\_\_\_\_

email: \_\_\_\_\_

Vendor Website: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Printed Name: \_\_\_\_\_ Title: \_\_\_\_\_

**End of Certificate of Compliance**



# PRICE PROPOSAL

*This form must accompany your Bid Proposal*

## 1. PRICE PROPOSAL CONSIDERATIONS.

- 1.1. Rates shall remain in effect throughout the contract term, up to four years.
- 1.2. Expenses. Out-of-pocket expenses incurred in performance of the work described herein will not be reimbursed by the State and should be factored into the fixed or hourly rates proposed.
- 1.3. The price proposal must be factored in US currency and remain valid for a minimum of 90 days.

## 2. PRICE PROPOSAL

2.1. Please use the table below to provide a fixed-rate price proposal per Task

<b>Deliverable Description</b>	<b>Fixed Price</b>
Task 0 – Project Initiation, Management & Execution	\$
Task 1 – Stakeholder Engagement & Outreach Plan	\$
Task 2 – Program Evaluation	\$
Task 3 - Vision, Outcomes and Measurement	\$
Task 4 – Program Recommendations	\$
Task 5 – Final Report	\$
<b>Total Project Cost:</b>	<b>\$</b>

### SUBCONTRACTOR REPORTING FORM

If applicable, this form must be completed in its entirety and submitted prior to contract execution and updated as necessary and provided to the State as additional subcontractors are hired.

The State, in accordance with Act 54, Section 32 of the Acts of 2009 and for total project costs exceeding \$250,000.00 requires bidders to comply with the following provisions and requirements.

Contractor is required to provide a list of subcontractors on the job along with lists of subcontractor's subcontractors and by whom those subcontractors are insured for workers' compensation purposes. Include additional pages if necessary. ***This is not a requirement for subcontractor's providing supplies only and no labor to the overall contract or project.***

RFP Title:

Contract Number:

Subcontractor	Insured By		Subcontractor's Sub	Insured By

Date: \_\_\_\_\_

Company: \_\_\_\_\_

Address \_\_\_\_\_

Email: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Title: \_\_\_\_\_

Phone Number: \_\_\_\_\_

By: \_\_\_\_\_

Name: \_\_\_\_\_

Failure to adhere to Act 54, Section 32 of the Acts of 2009 and submit Subcontractor Reporting: Worker Classification Compliance Requirement will constitute non-compliance and may result in cancellation of contract and/or forfeiture of future bidding privileges until resolved.

Send Completed Form with Bid. Updates after executed contract shall be sent to the State's contract manager.

## STANDARD CONTRACT FOR SERVICES

1. **Parties.** This is a contract for services between the State of Vermont, Department (hereinafter called “State”), and XXX, with a principal place of business in XXX, (hereinafter called “Contractor”). Contractor’s form of business organization is XXX. It is Contractor’s responsibility to contact the Vermont Department of Taxes to determine if, by law, Contractor is required to have a Vermont Department of Taxes Business Account Number.
2. **Subject Matter.** The subject matter of this contract is XXX Detailed services to be provided by Contractor are described in Attachment A.
3. **Maximum Amount.** In consideration of the services to be performed by Contractor, the State agrees to pay Contractor, in accordance with the payment provisions specified in Attachment B, a sum not to exceed \$.
4. **Contract Term.** The period of Contractor’s performance shall begin on START DATE and end on END DATE. Upon mutual agreement, this contract may be extended for two additional twelve (12)-month periods.
5. **Prior Approvals.** This Contract shall not be binding unless and until all requisite prior approvals have been obtained in accordance with current State law, bulletins, and interpretations.
- 5A. **Sole Source Contract for Services.** This Contract results from a “sole source” procurement under State of Vermont Administrative Bulletin 3.5 process and Contractor hereby certifies that it is and will remain in compliance with the campaign contribution restrictions under 17 V.S.A. § 2950.
6. **Amendment.** Changes, modifications, or amendments to the terms and conditions of this contract shall be reduced to writing, numbered and signed by the duly authorized representative of the State and Contractor.
7. **Termination for Convenience.** This contract may be terminated by the State at any time by giving written notice at least thirty (30) days in advance. In such event, Contractor shall be paid under the terms of this contract for all services provided to and accepted by the State prior to the effective date of termination.
8. **Points of Contact.** Each Party shall designate one primary point of contact for this Agreement. The State’s point of contact is the Contract Manager. Changes or updates to points of contact shall be conveyed in writing and include, at a minimum: contact name, phone number and email. Updates and changes to the Points of Contact shall not alone warrant an Amendment to the Contract but shall be reflected when changes to the terms and conditions require an Amendment

Party	Name	Phone	Email
State:			
Contractor:			

9. **Attachments.** This contract consists of [redacted] pages including the following attachments which are incorporated herein:

- Attachment A – Scope of Work
- Attachment B – Payment Provisions
- Attachment C – Standard State Provisions for Contracts and Grants (rev. 12/15/17)
- Attachment D – Additional Standard Provisions for Contracts and Grants
- Attachment E – State of Vermont Federal Terms Supplement (Non-Construction)
- Exhibit 1 – Subcontractor Reporting Form
- Appendix 1 – Performance Measures & Evaluation

10. **Order of Precedence.** Any ambiguity, conflict or inconsistency between the documents comprising this contract shall be resolved according to the following order of precedence:

1. Standard Contract
2. Attachment C – Standard State Provisions for Contracts and Grants (rev. 12/15/17)
3. Attachment D – Additional Standard Provisions for Contracts and Grants
4. Attachment E – State of Vermont Federal Terms Supplement (Non-Construction)
5. Attachment A – Scope of Work
6. Attachment B – Payment Provisions
7. Exhibit 1 – Subcontractor Reporting Form
8. Appendix 1 – Performance Measures & Evaluation

**WE THE UNDERSIGNED PARTIES AGREE TO BE BOUND BY THIS CONTRACT**

**STATE OF VERMONT**

**CONTRACTOR**

**Date:** \_\_\_\_\_

**By:** \_\_\_\_\_

**Name:** \_\_\_\_\_

**Title:** \_\_\_\_\_

**Dept:** \_\_\_\_\_

**Date:** \_\_\_\_\_

**By:** \_\_\_\_\_

**Name:** \_\_\_\_\_

**Title:** \_\_\_\_\_

\_\_\_\_\_

*For internal use only:*

Distribution:  
 DeptId:  
 Fund:  
 Project:  
 Class:  
 Account:

---

**ATTACHMENT A – STATEMENT OF WORK**

1. Contractor shall

**ATTACHMENT B – PAYMENT PROVISIONS**

The maximum dollar amount payable under this contract is not intended as any form of a guaranteed amount. The Contractor will be paid for products or services actually delivered or performed, as specified in Attachment A, up to the maximum allowable amount specified herein.

1. **Required Documents.** Prior to commencement of work and release of any payments, Contractor shall submit to the State a Certificate of Insurance (COI) consistent with the requirements set forth in Attachment C, Section 8 (Insurance), and Attachment D, Section ##
2. **Payment Terms.** The maximum contract amount shall not exceed \$\$\$\$. The payment terms are Net 30 days from the date the State receives an error-free invoice with all necessary and complete supporting documentation.
3. **Payment Schedule.** (from RFP-awarded bid) Contractor shall be paid in accordance with the schedule below, submission of a satisfactory invoice and if applicable, upon satisfactory site inspection by the State's project manager.

***(Placeholder for payment schedule, hourly rates, time and material itemization, etc.)***

4. **Invoices.** Contractor shall submit detailed invoices itemizing all work performed during the invoice period, including the dates of service, rates of pay, hours of work performed, and any other information and/or documentation appropriate and sufficient to substantiate the amount invoiced for payment by the State.
  - 4.1. All invoices must include the Contract ##### for this contract.
  - 4.2. Invoices shall be submitted to the State electronically to the following email address:  
[accd.accountspayable@vermont.gov](mailto:accd.accountspayable@vermont.gov)

## ATTACHMENT C – STANDARD STATE PROVISIONS FOR CONTRACTS AND GRANTS

*REVISED DECEMBER 15, 2017*

**1. Definitions:** For purposes of this Attachment, “Party” shall mean the Contractor, Grantee or Subrecipient, with whom the State of Vermont is executing this Agreement and consistent with the form of the Agreement. “Agreement” shall mean the specific contract or grant to which this form is attached.

**2. Entire Agreement:** This Agreement, whether in the form of a contract, State-funded grant, or Federally-funded grant, represents the entire agreement between the parties on the subject matter. All prior agreements, representations, statements, negotiations, and understandings shall have no effect.

**3. Governing Law, Jurisdiction and Venue; No Waiver of Jury Trial:** This Agreement will be governed by the laws of the State of Vermont. Any action or proceeding brought by either the State or the Party in connection with this Agreement shall be brought and enforced in the Superior Court of the State of Vermont, Civil Division, Washington Unit. The Party irrevocably submits to the jurisdiction of this court for any action or proceeding regarding this Agreement. The Party agrees that it must first exhaust any applicable administrative remedies with respect to any cause of action that it may have against the State with regard to its performance under this Agreement. Party agrees that the State shall not be required to submit to binding arbitration or waive its right to a jury trial.

**4. Sovereign Immunity:** The State reserves all immunities, defenses, rights or actions arising out of the State’s sovereign status or under the Eleventh Amendment to the United States Constitution. No waiver of the State’s immunities, defenses, rights or actions shall be implied or otherwise deemed to exist by reason of the State’s entry into this Agreement.

**5. No Employee Benefits For Party:** The Party understands that the State will not provide any individual retirement benefits, group life insurance, group health and dental insurance, vacation or sick leave, workers compensation or other benefits or services available to State employees, nor will the State withhold any state or Federal taxes except as required under applicable tax laws, which shall be determined in advance of execution of the Agreement. The Party understands that all tax returns required by the Internal Revenue Code and the State of Vermont, including but not limited to income, withholding, sales and use, and rooms and meals, must be filed by the Party, and information as to Agreement income will be provided by the State of Vermont to the Internal Revenue Service and the Vermont Department of Taxes.

**6. Independence:** The Party will act in an independent capacity and not as officers or employees of the State.

**7. Defense and Indemnity:** The Party shall defend the State and its officers and employees against all third party claims or suits arising in whole or in part from any act or omission of the Party or of any agent of the Party in connection with the performance of this Agreement. The State shall notify the Party in the event of any such claim or suit, and the Party shall immediately retain counsel and otherwise provide a complete defense against the entire claim or suit. The State retains the right to participate at its own expense in the defense of any claim. The State shall have the right to approve all proposed settlements of such claims or suits.

After a final judgment or settlement, the Party may request recoupment of specific defense costs and may file suit in Washington Superior Court requesting recoupment. The Party shall be entitled to recoup costs only upon a showing that such costs were entirely unrelated to the defense of any claim arising from an act or omission of the Party in connection with the performance of this Agreement.

The Party shall indemnify the State and its officers and employees if the State, its officers or employees become legally obligated to pay any damages or losses arising from any act or omission of the Party or an agent of the Party in connection with the performance of this Agreement.

Notwithstanding any contrary language anywhere, in no event shall the terms of this Agreement or any document furnished by the Party in connection with its performance under this Agreement obligate the State to (1) defend or indemnify the Party or any third party, or (2) otherwise be liable for the expenses or reimbursement, including attorneys' fees, collection costs or other costs of the Party or any third party.

**8. Insurance:** Before commencing work on this Agreement the Party must provide certificates of insurance to show that the following minimum coverages are in effect. It is the responsibility of the Party to maintain current certificates of insurance on file with the State through the term of this Agreement. No warranty is made that the coverages and limits listed herein are adequate to cover and protect the interests of the Party for the Party's operations. These are solely minimums that have been established to protect the interests of the State.

*Workers Compensation:* With respect to all operations performed, the Party shall carry workers' compensation insurance in accordance with the laws of the State of Vermont. Vermont will accept an out-of-state employer's workers' compensation coverage while operating in Vermont provided that the insurance carrier is licensed to write insurance in Vermont and an amendatory endorsement is added to the policy adding Vermont for coverage purposes. Otherwise, the party shall secure a Vermont workers' compensation policy, if necessary to comply with Vermont law.

*General Liability and Property Damage:* With respect to all operations performed under this Agreement, the Party shall carry general liability insurance having all major divisions of coverage including, but not limited to:

- Premises - Operations
- Products and Completed Operations
- Personal Injury Liability
- Contractual Liability

The policy shall be on an occurrence form and limits shall not be less than:

- \$1,000,000 Each Occurrence
- \$2,000,000 General Aggregate
- \$1,000,000 Products/Completed Operations Aggregate
- \$1,000,000 Personal & Advertising Injury

*Automotive Liability:* The Party shall carry automotive liability insurance covering all motor vehicles, including hired and non-owned coverage, used in connection with the Agreement. Limits of coverage shall not be less than \$500,000 combined single limit. If performance of this Agreement involves construction, or the transport of persons or hazardous materials, limits of coverage shall not be less than \$1,000,000 combined single limit.

*Additional Insured.* The General Liability and Property Damage coverages required for performance of this Agreement shall include the State of Vermont and its agencies, departments, officers and employees as Additional Insureds. If performance of this Agreement involves construction, or the transport of persons or hazardous materials, then the required Automotive Liability coverage shall include the State of Vermont and its agencies, departments, officers and employees as Additional Insureds. Coverage shall be primary and non-contributory with any other insurance and self-insurance.

*Notice of Cancellation or Change.* There shall be no cancellation, change, potential exhaustion of aggregate limits or non-renewal of insurance coverage(s) without thirty (30) days written prior written notice to the State.

**9. Reliance by the State on Representations:** All payments by the State under this Agreement will be made in reliance upon the accuracy of all representations made by the Party in accordance with this Agreement, including but not limited to bills, invoices, progress reports and other proofs of work.

**10. False Claims Act:** The Party acknowledges that it is subject to the Vermont False Claims Act as set forth in 32 V.S.A. § 630 *et seq.* If the Party violates the Vermont False Claims Act it shall be liable to the State for civil penalties, treble damages and the costs of the investigation and prosecution of such violation, including



attorney's fees, except as the same may be reduced by a court of competent jurisdiction. The Party's liability to the State under the False Claims Act shall not be limited notwithstanding any agreement of the State to otherwise limit Party's liability.

**11. Whistleblower Protections:** The Party shall not discriminate or retaliate against one of its employees or agents for disclosing information concerning a violation of law, fraud, waste, abuse of authority or acts threatening health or safety, including but not limited to allegations concerning the False Claims Act. Further, the Party shall not require such employees or agents to forego monetary awards as a result of such disclosures, nor should they be required to report misconduct to the Party or its agents prior to reporting to any governmental entity and/or the public.

**12. Location of State Data:** No State data received, obtained, or generated by the Party in connection with performance under this Agreement shall be processed, transmitted, stored, or transferred by any means outside the continental United States, except with the express written permission of the State.

**13. Records Available for Audit:** The Party shall maintain all records pertaining to performance under this agreement. "Records" means any written or recorded information, regardless of physical form or characteristics, which is produced or acquired by the Party in the performance of this agreement. Records produced or acquired in a machine readable electronic format shall be maintained in that format. The records described shall be made available at reasonable times during the period of the Agreement and for three years thereafter or for any period required by law for inspection by any authorized representatives of the State or Federal Government. If any litigation, claim, or audit is started before the expiration of the three-year period, the records shall be retained until all litigation, claims or audit findings involving the records have been resolved.

**14. Fair Employment Practices and Americans with Disabilities Act:** Party agrees to comply with the requirement of 21 V.S.A. Chapter 5, Subchapter 6, relating to fair employment practices, to the full extent applicable. Party shall also ensure, to the full extent required by the Americans with Disabilities Act of 1990, as amended, that qualified individuals with disabilities receive equitable access to the services, programs, and activities provided by the Party under this Agreement.

**15. Set Off:** The State may set off any sums which the Party owes the State against any sums due the Party under this Agreement; provided, however, that any set off of amounts due the State of Vermont as taxes shall be in accordance with the procedures more specifically provided hereinafter.

**16. Taxes Due to the State:**

- A. Party understands and acknowledges responsibility, if applicable, for compliance with State tax laws, including income tax withholding for employees performing services within the State, payment of use tax on property used within the State, corporate and/or personal income tax on income earned within the State.
- B. Party certifies under the pains and penalties of perjury that, as of the date this Agreement is signed, the Party is in good standing with respect to, or in full compliance with, a plan to pay any and all taxes due the State of Vermont.
- C. Party understands that final payment under this Agreement may be withheld if the Commissioner of Taxes determines that the Party is not in good standing with respect to or in full compliance with a plan to pay any and all taxes due to the State of Vermont.
- D. Party also understands the State may set off taxes (and related penalties, interest and fees) due to the State of Vermont, but only if the Party has failed to make an appeal within the time allowed by law, or an appeal has been taken and finally determined and the Party has no further legal recourse to contest the amounts due.

**17. Taxation of Purchases:** All State purchases must be invoiced tax free. An exemption certificate will be furnished upon request with respect to otherwise taxable items.

**18. Child Support:** (Only applicable if the Party is a natural person, not a corporation or partnership.) Party states that, as of the date this Agreement is signed, he/she:

- A. is not under any obligation to pay child support; or
- B. is under such an obligation and is in good standing with respect to that obligation; or
- C. has agreed to a payment plan with the Vermont Office of Child Support Services and is in full compliance with that plan.

Party makes this statement with regard to support owed to any and all children residing in Vermont. In addition, if the Party is a resident of Vermont, Party makes this statement with regard to support owed to any and all children residing in any other state or territory of the United States.

**19. Sub-Agreements:** Party shall not assign, subcontract or subgrant the performance of this Agreement or any portion thereof to any other Party without the prior written approval of the State. Party shall be responsible and liable to the State for all acts or omissions of subcontractors and any other person performing work under this Agreement pursuant to an agreement with Party or any subcontractor.

In the case this Agreement is a contract with a total cost in excess of \$250,000, the Party shall provide to the State a list of all proposed subcontractors and subcontractors' subcontractors, together with the identity of those subcontractors' workers compensation insurance providers, and additional required or requested information, as applicable, in accordance with Section 32 of The Vermont Recovery and Reinvestment Act of 2009 (Act No. 54).

Party shall include the following provisions of this Attachment C in all subcontracts for work performed solely for the State of Vermont and subcontracts for work performed in the State of Vermont: Section 10 ("False Claims Act"); Section 11 ("Whistleblower Protections"); Section 12 ("Location of State Data"); Section 14 ("Fair Employment Practices and Americans with Disabilities Act"); Section 16 ("Taxes Due the State"); Section 18 ("Child Support"); Section 20 ("No Gifts or Gratuities"); Section 22 ("Certification Regarding Debarment"); Section 30 ("State Facilities"); and Section 32.A ("Certification Regarding Use of State Funds").

**20. No Gifts or Gratuities:** Party shall not give title or possession of anything of substantial value (including property, currency, travel and/or education programs) to any officer or employee of the State during the term of this Agreement.

**21. Copies:** Party shall use reasonable best efforts to ensure that all written reports prepared under this Agreement are printed using both sides of the paper.

**22. Certification Regarding Debarment:** Party certifies under pains and penalties of perjury that, as of the date that this Agreement is signed, neither Party nor Party's principals (officers, directors, owners, or partners) are presently debarred, suspended, proposed for debarment, declared ineligible or excluded from participation in Federal programs, or programs supported in whole or in part by Federal funds.

Party further certifies under pains and penalties of perjury that, as of the date that this Agreement is signed, Party is not presently debarred, suspended, nor named on the State's debarment list at: <http://bgs.vermont.gov/purchasing/debarment>

**23. Conflict of Interest:** Party shall fully disclose, in writing, any conflicts of interest or potential conflicts of interest.

**24. Confidentiality:** Party acknowledges and agrees that this Agreement and any and all information obtained by the State from the Party in connection with this Agreement are subject to the State of Vermont Access to Public Records Act, 1 V.S.A. § 315 et seq.

**25. Force Majeure:** Neither the State nor the Party shall be liable to the other for any failure or delay of performance of any obligations under this Agreement to the extent such failure or delay shall have been wholly or principally caused by acts or events beyond its reasonable control rendering performance illegal or impossible (excluding strikes or lock-outs) (“Force Majeure”). Where Force Majeure is asserted, the nonperforming party must prove that it made all reasonable efforts to remove, eliminate or minimize such cause of delay or damages, diligently pursued performance of its obligations under this Agreement, substantially fulfilled all non-excused obligations, and timely notified the other party of the likelihood or actual occurrence of an event described in this paragraph.

**26. Marketing:** Party shall not refer to the State in any publicity materials, information pamphlets, press releases, research reports, advertising, sales promotions, trade shows, or marketing materials or similar communications to third parties except with the prior written consent of the State.

**27. Termination:**

**A. Non-Appropriation:** If this Agreement extends into more than one fiscal year of the State (July 1 to June 30), and if appropriations are insufficient to support this Agreement, the State may cancel at the end of the fiscal year, or otherwise upon the expiration of existing appropriation authority. In the case that this Agreement is a Grant that is funded in whole or in part by Federal funds, and in the event Federal funds become unavailable or reduced, the State may suspend or cancel this Grant immediately, and the State shall have no obligation to pay Subrecipient from State revenues.

**B. Termination for Cause:** Either party may terminate this Agreement if a party materially breaches its obligations under this Agreement, and such breach is not cured within thirty (30) days after delivery of the non-breaching party’s notice or such longer time as the non-breaching party may specify in the notice.

**C. Termination Assistance:** Upon nearing the end of the final term or termination of this Agreement, without respect to cause, the Party shall take all reasonable and prudent measures to facilitate any transition required by the State. All State property, tangible and intangible, shall be returned to the State upon demand at no additional cost to the State in a format acceptable to the State.

**28. Continuity of Performance:** In the event of a dispute between the Party and the State, each party will continue to perform its obligations under this Agreement during the resolution of the dispute until this Agreement is terminated in accordance with its terms.

**29. No Implied Waiver of Remedies:** Either party’s delay or failure to exercise any right, power or remedy under this Agreement shall not impair any such right, power or remedy, or be construed as a waiver of any such right, power or remedy. All waivers must be in writing.

**30. State Facilities:** If the State makes space available to the Party in any State facility during the term of this Agreement for purposes of the Party’s performance under this Agreement, the Party shall only use the space in accordance with all policies and procedures governing access to and use of State facilities which shall be made available upon request. State facilities will be made available to Party on an “AS IS, WHERE IS” basis, with no warranties whatsoever.

**31. Requirements Pertaining Only to Federal Grants and Subrecipient Agreements:** If this Agreement is a grant that is funded in whole or in part by Federal funds:

**A. Requirement to Have a Single Audit:** The Subrecipient will complete the Subrecipient Annual Report annually within 45 days after its fiscal year end, informing the State of Vermont whether or not a Single Audit is required for the prior fiscal year. If a Single Audit is required, the Subrecipient will submit a copy of the audit report to the granting Party within 9 months. If a single audit is not required, only the Subrecipient Annual Report is required.

For fiscal years ending before December 25, 2015, a Single Audit is required if the subrecipient expends \$500,000 or more in Federal assistance during its fiscal year and must be conducted in accordance with OMB Circular A-133. For fiscal years ending on or after December 25, 2015, a Single Audit is required if the subrecipient expends \$750,000 or more in Federal assistance during its fiscal year and must be conducted in accordance with 2 CFR Chapter I, Chapter II, Part 200, Subpart F. The Subrecipient Annual Report is required to be submitted within 45 days, whether or not a Single Audit is required.

**B. Internal Controls:** In accordance with 2 CFR Part II, §200.303, the Party must establish and maintain effective internal control over the Federal award to provide reasonable assurance that the Party is managing the Federal award in compliance with Federal statutes, regulations, and the terms and conditions of the award. These internal controls should be in compliance with guidance in “Standards for Internal Control in the Federal Government” issued by the Comptroller General of the United States and the “Internal Control Integrated Framework”, issued by the Committee of Sponsoring Organizations of the Treadway Commission (COSO).

**C. Mandatory Disclosures:** In accordance with 2 CFR Part II, §200.113, Party must disclose, in a timely manner, in writing to the State, all violations of Federal criminal law involving fraud, bribery, or gratuity violations potentially affecting the Federal award. Failure to make required disclosures may result in the imposition of sanctions which may include disallowance of costs incurred, withholding of payments, termination of the Agreement, suspension/debarment, etc.

### **32. Requirements Pertaining Only to State-Funded Grants:**

**A. Certification Regarding Use of State Funds:** If Party is an employer and this Agreement is a State-funded grant in excess of \$1,001, Party certifies that none of these State funds will be used to interfere with or restrain the exercise of Party’s employee’s rights with respect to unionization.

**B. Good Standing Certification (Act 154 of 2016):** If this Agreement is a State-funded grant, Party hereby represents: (i) that it has signed and provided to the State the form prescribed by the Secretary of Administration for purposes of certifying that it is in good standing (as provided in Section 13(a)(2) of Act 154) with the Agency of Natural Resources and the Agency of Agriculture, Food and Markets, or otherwise explaining the circumstances surrounding the inability to so certify, and (ii) that it will comply with the requirements stated therein.

(End of Standard Provisions)

## ATTACHMENT D - ADDITIONAL STATE OF VERMONT CONTRACT & GRANT PROVISIONS

1. **Professional Liability Insurance.** Before commencing work on this Agreement and throughout the term of this Agreement, the Party shall procure and maintain professional liability insurance for services performed under this Agreement, with minimum coverage as required by the Agency of Administration but not less than \$1,000,000 per claim and \$2,000,000 policy aggregate.
2. **Ownership of Equipment.** Any equipment or IT software purchased by or furnished to the Contractor/Grantee by the State under this Agreement is provided on a loan basis only and remains the property of the State.
3. **Publications.** Any notices, information pamphlets, press releases, research reports, or similar other publications prepared in written or oral form by the Contractor/Grantee under this Agreement shall be reviewed and approved by the State prior to release.
4. **Work product ownership:** Upon full payment by the State, all products of the Contractor's work, including outlines, reports, charts, sketches, drawings, art work, plans, photographs, specifications, estimates, computer programs, or similar documents, become the sole property of the State of Vermont and may not be copyrighted or resold by Contractor.
5. **Copyright:** Upon full payment by the State, all products of the contractor's work, including but not limited to outlines, reports, charts, sketches, drawings, artwork, plans, photographs, specifications, estimates, computer programs, or similar documents, becomes the sole property of the State of Vermont and may not be copyrighted or resold by Contractor/Grantee. The Contractor/Grantee will exercise due care in creating or selecting material for publication to ensure that such material does not violate the copyright, trademark, or similar rights of others. To the extent the Contractor uses copyrighted materials in performance of work under this Contract/Grant, the Contractor/Grantee shall document and provide the state with the precise terms of the licensed use granted to the State by the owner of the copyright for future use of the copyrighted material. The Contractor/Grantee shall not use any copyright protected material in the performance of the work under this contract that would require the payment of any additional fee not contemplated herein for present or future use of the same by the State.

(End of Attachment D)

## EXHIBIT 1 - SUBCONTRACTOR REPORTING FORM

**This form must be completed in its entirety and submitted prior to contract execution and updated as necessary and provided to the State as additional subcontractors are hired.**

The Department of Buildings and General Services in accordance with Act 54, Section 32 of the Acts of 2009 and for total project costs exceeding \$250,000.00 requires bidders to comply with the following provisions and requirements.

Contractor is required to provide a list of subcontractors on the job along with lists of subcontractor's subcontractors and by whom those subcontractors are insured for workers' compensation purposes. Include additional pages if necessary. This is not a requirement for subcontractor's providing supplies only and no labor to the overall contract or project.

Subcontractor	Insured By	Subcontractor's Sub	Insured By

Date: \_\_\_\_\_

Company Name: \_\_\_\_\_ Contact: \_\_\_\_\_

Address: \_\_\_\_\_ Telephone: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_ Fax: \_\_\_\_\_

email: \_\_\_\_\_

Vendor Website: \_\_\_\_\_

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Printed Name: \_\_\_\_\_ Title: \_\_\_\_\_

Failure to adhere to Act 54, Section 32 of the Acts of 2009 and submit Subcontractor Reporting: Worker Classification Compliance Requirement will constitute non-compliance and may result in cancellation of contract and/or forfeiture of future bidding privileges until resolved.

**APPENDIX 1  
PERFORMANCE MEASURES & EVALUATION**

The **Grantee/Contractor** will be evaluated on performance of the work contained herein. Low performance scores may result in no further grants/contracts with the State of Vermont Agency of Commerce & Community Development.

<b>PERFORMANCE MEASURES &amp; EVALUATION</b>			
<b>Benchmarks/Deliverables</b>	<b>Needs Improvement</b>	<b>Met Expectations</b>	<b>Exceeded Expectations</b>

\_\_\_\_\_ *Name of person completing form*

\_\_\_\_\_ *Title*

\_\_\_\_\_ *Date*