

Procurement Tools

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Harvest Procurement Innovation

Introduction

- We will be offering a variety of tools, including templates, samples, and websites
- We've organized this presentation to follow the procurement cycle
- Official templates/forms can be found on [VendorNet](#)
- Most sample documents (and all other conference materials) are available electronically on the conference website:
 - <https://doa.wi.gov/procurement> > Annual Procurement Conference (center column, under Procurement Training (<https://doa.wi.gov/Pages/StateEmployees/PROConference.aspx>))



Agenda & Reference Guide



Official



Samples



Websites



Official Templates & Forms



Samples



Websites



Agenda & Reference Guide



Official



Official Templates & Forms

- New RFB Template (02/18)
- DOA-3054: Standard Terms & Conditions (R1/2018)
- DOA-3046: RPA Template (R09/2017)
- DOA-3832: Bidder Required Form (C01/2018)
- DOA-3310: Request for IT or Consultant Purchases over \$150,000
- DOA-3831: Star Piggybacking Request (04/18)



Agenda & Reference Guide



Samples

- RFB & RFP Process Maps
- RFB & RFP Checklist
- User Guide for new RFB Template
- Bidder Outreach Letter
- Contract Renewal Analysis



Agenda & Reference Guide



Websites



Websites

- RPA Electronic System (includes 150K)
- School Safety
- Supplier Diversity
- DOA Internet Site
- VendorNet

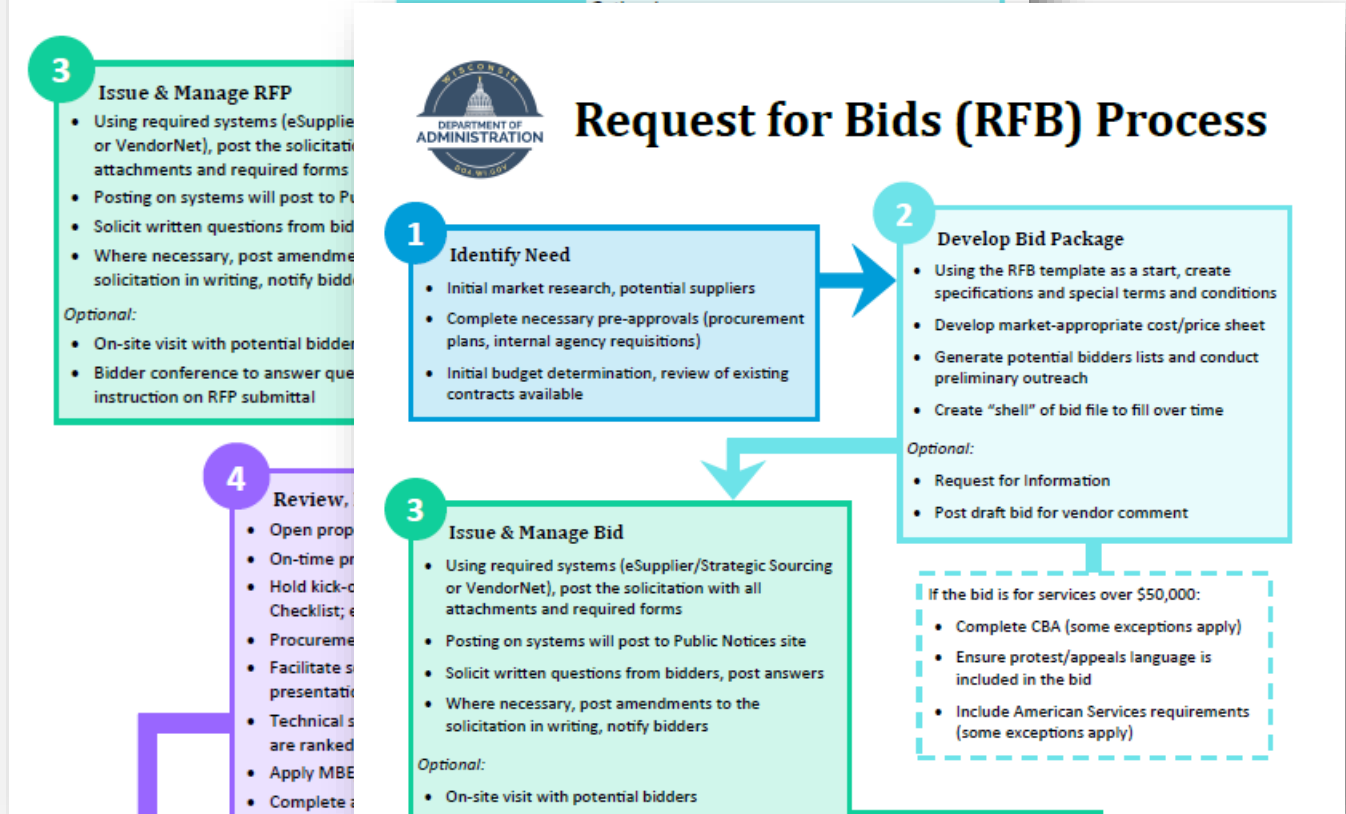
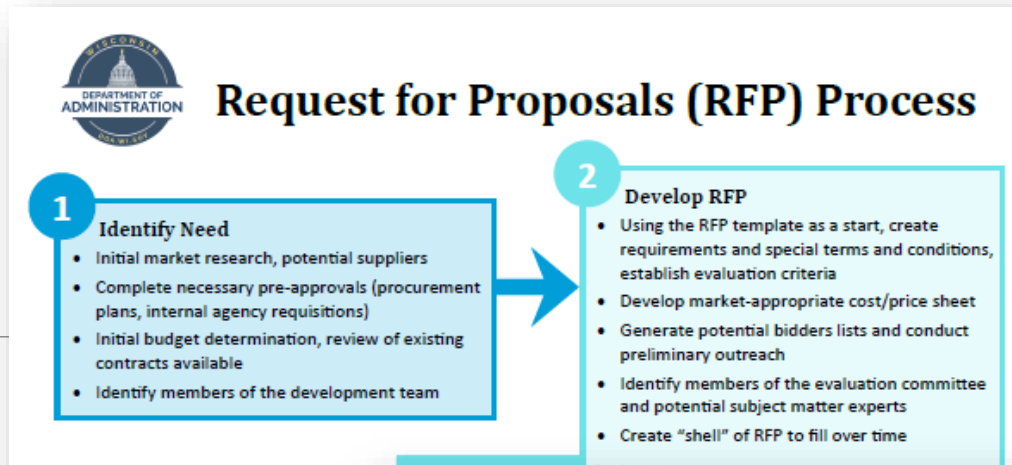


RFB & RFP Process Maps

- Share with your RFB/RFP development team
- Helps ensure you cover all details of the process

Hardcopy handouts provided, available on conference website

[RFB Process Map link](#)
[RFP Process Map link](#)



RFB & RFP Checklists



Request for Proposal (RFP) Check List - RFP #						
	Description	Handled By	Estimated Business Days	Targeted Completion Date	Completed	Date Completed
1.	Identify Need					
	- Is this a New or Existing Procurement? ▪ If existing what is the current contract number?	Agency	0 days			
	- Is this a software purchase?	Agency/CAPS	0 - 3 days	1/4/1900	Yes <input type="checkbox"/> No <input type="checkbox"/>	
	- If it's not a software purchase, is there an existing contract that can be used? NO				Yes <input type="checkbox"/> No <input type="checkbox"/>	
	- Decide if the procurement is a Commodity or a Service AND create a timeline based on the target contract start date.	Agency/CAPS	0 days	1/4/1900	Service	
2.	Develop RFP					
	Procurement Plan: Services Only, PRO-A-4				Yes <input type="checkbox"/> No <input type="checkbox"/>	
	- Complete Procurement Plan and send, via email, to Procurement Specialist	Agency	0 - 4 days	1/10/1900	<input type="checkbox"/>	
	- Sends completed Procurement Plan to Bureau of Procurement Office	CAPS	0 days	1/10/1900	<input type="checkbox"/>	
	- Receives approved or denied Procurement Plan		7 - 10 days	1/24/1900	<input type="checkbox"/>	
	Cost Benefit Analysis (CBA): Services Only, PRO-1-15				Yes <input type="checkbox"/> No <input type="checkbox"/>	
	- Tracking Number	Agency	0 days	1/24/1900		

- These follow the Process Maps, but include additional detail:
 - Give each step's estimated days to complete and a target date of completion to keep the project on point
 - Writing down the actual date completed will assist with future timelines



[RFB Checklist Link](#)
[RFP Checklist Link](#)

RFB Template & User Guide



- Benefits:
 - Legal review of terms and conditions
 - Consistency in wording, structure
 - Provides uniformity across agencies
 - Allows for easier review for bidders

[Request for Bid Template Link](#)

[Example Bid Link](#)

RFB User Guide Link – Must login to [VendorNet](#)



Bidder Required Form



Official

Bidder Required Form (DOA-3832)

RFB Cover
(DOA-3070)

RFP Cover
(DOA-3261)

Confidential
Info
(DOA-3027)

Vendor Info
(DOA-3477)

Vendor
Reference
(DOA-3478)

Coop
Purchasing
(DOA-3333)

[Bidder Required Form \(DOA-3832\) Link](#)





Standard Terms & Conditions

- [DOA-3054: Standard Terms & Conditions](#) includes the most current updates, has been approved by legal, and gives agencies full protection
- Recent updates include:
 - Section 19.4: Per E.O. 261, Contractor agrees it is not engaged in a boycott of the State of Israel
 - Section 26.0, Public Records Access: Retention updated from 4 to 6 years:
 - “The contractor, following final payment, shall retain all records produced or collected under this contract for six (6) years.”

[Sample Standard Terms & Conditions with Highlighted Portions Link](#)





Bidder Outreach Letter

- Includes information bidders should be aware of:
 - How to register in eSupplier
 - The NIGP codes attached to the bid
- To be sent to all bidders registered for the identified NIGP codes
- May also be sent to any other vendors not currently registered on eSupplier that you learned about through market research or end-user recommendations

[Example Bid Notification Email Link](#)

[Example Bid Notification Attachment Link](#)





Websites

Supplier Diversity Website

- Supplier Diversity worked with SBOP and DET to enhance their website: <https://wisdp.wi.gov/>
- Emails to newly certified businesses now includes link to eSupplier
- Created new buttons:
 - ★ *Register for eSupplier*
 - ★ *Current Goods/Services Bids – links to VendorNet’s “Bids” tab*

WELCOME TO THE WISCONSIN SUPPLIER DIVERSITY PROGRAM - BUSINESS CERTIFICATIONS

CLICK HERE TO VIEW THE WISCONSIN SUPPLIER DIVERSITY PROGRAM'S MBE & DVB ANNUAL REPORT
[2017 SUPPLIER DIVERSITY ANNUAL REPORT](#)

ALL QUESTIONS APPLICABLE TO THE TYPE OF BUSINESS MUST BE ANSWERED ON THE ONLINE APPLICATION FORM

WE ENCOURAGE ALL INTERESTED BIDDERS TO REGISTER AND SEARCH FOR NEW OPPORTUNITIES IN THE NEW [ESUPPLIER PORTAL](#) IF YOU WOULD LIKE TO RECEIVE BID NOTICES FROM THE STATE OF WISCONSIN.

Search Certified Suppliers Database

Apply for Certification

Login

★ Register for eSupplier

★ Current Goods/Services Bids



RPA Template & Checklist



- DOA-3046: Request for Purchasing Authority (RPA)
- DOA-3046A: RPA Checklist
- Eliminates the need for an additional document or memo to justify the need; now built into the form
- Addresses STAR Software Purchasing Policy

State of Wisconsin
Department of Administration
State Bureau of Procurement
DOA-3046A (R09/2017)

REQUEST FOR PURCHASING AUTHORITY CHECKLIST

INSTRUCTIONS: Agency must submit this checklist with the Request for Purchasing Authority (RPA) form (DOA-3046). Confirm the package is complete by noting a check (X) or NA as appropriate.

FOR STATE BUREAU OF PROCUREMENT (SBOP) USE ONLY

RPA No: _____ Log In Date: _____ Case No: _____ Manager: _____

*State Use Program Manager and Supplier Diversity Director receive an electronic copy of the RPA.

Comments _____

Documentation to be submitted with RPA

NOTE: Applicable State Procurement Manual sections are referenced.

SBOP	Agency Check Here	Transmittal (justification) memo stating	Requirements (X)				
			A M E N D M E N T	B I D W A I V E R	M O T O R V E H I C L E S	L E G A L S E R V I C E S	C O L L E C T I V E
			X	X	X	X	X
		RO-1-4		X	X	X	X
				X	X	X	X
				X	X	X	X
				X	X	X	X
				X	X	X	X
		2-2		X	X	X	X
		28		X	X	X	X
				X	X	X	X
		ble					X
							X

STATE OF WISCONSIN
DEPARTMENT OF ADMINISTRATION
DOA-3046 (R09/2017)
S. 16.72 WIS. STATS

STATE BUREAU OF PROCUREMENT
101 EAST WILSON STREET, 6TH FLOOR
P. O. BOX 7867
MADISON, WI 53707-7867

Request for Purchasing Authority (RPA)

Instructions: Attach the completed form to online RPA request at <https://rpa.wi.gov>.

Section 1: General Information

Agency Requesting RPA: _____ Agency Business Unit Number: _____

RPA Type (Check one only) Noncompetitive (Sole Source) Legal Services
 General Waiver Collective Purchase
 Motor Vehicle

RPA Title _____

RPA Number ((Agency Prefix (2 alpha) FY Code (1 alpha) Number (4)) Amendment No. (if applicable) _____

Agency Program Contact Name: _____ Phone Number: _____ E-Mail Address: _____

Contract Term: _____ Renewals: _____ Total Spend (Contract Term and Renewals): _____

Vendor Name (Sole Source; "Multiple" if General Waiver) _____ Vendor Address (Sole Source; "Multiple" if General Waiver) _____



Request for IT or Consultant Purchases over \$150K



- [DOA-3310: Request for IT or Private Consultant Purchase over \\$150,000](#)
 - [Executive Order 288](#) requires all State agencies obtain approval of the DOA Secretary prior to making IT-related and private consulting purchases over \$150,000 ([PIM 18-003](#))
- \$150K will be discussed in more detail in two afternoon workshops
 - Procurement Operations & Executive Order 288 (Session 3) – focuses on policy
 - What's Your Solution: Procurement Systems (Session 4) – focuses on using the \$150K System



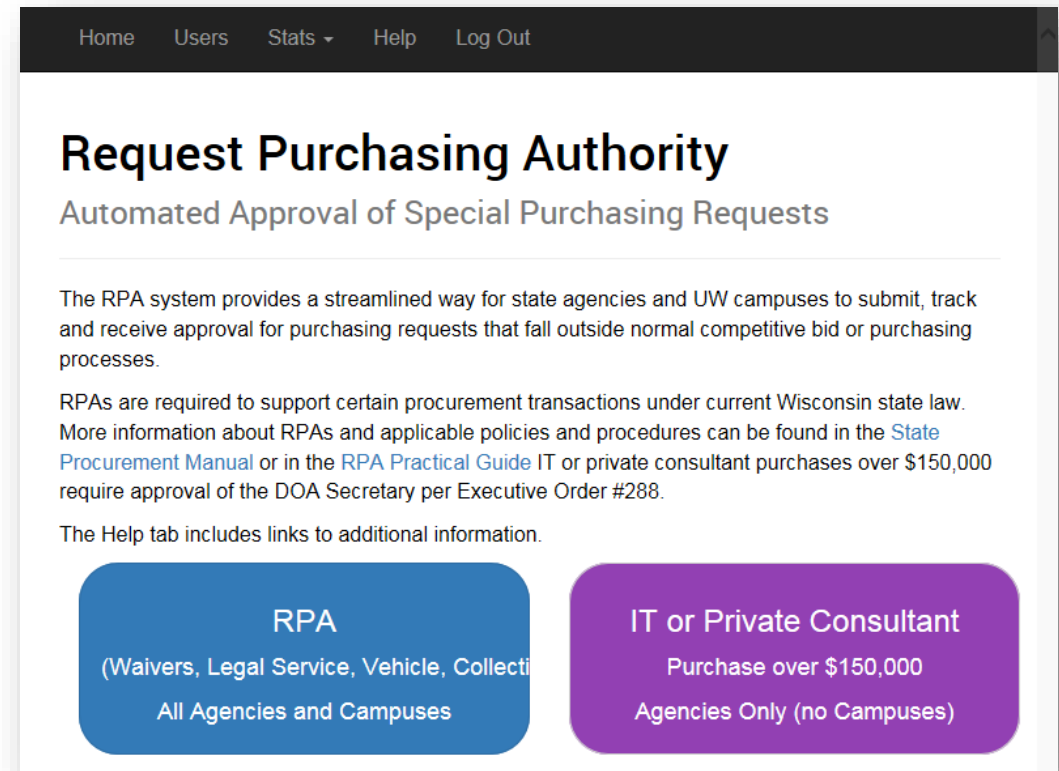
RPA.wi.gov



- <https://rpa.wi.gov/> allows access to:
 - Automated RPA System (fall 2017)
 - \$150K System (summer 2018)
- Depending on their assigned role(s), users may see one or both buttons after logging in
- Allows for reporting of metrics on system usage

[RPA & \\$150K System User Guides](#)

RPA Justifications Practical Guide Link – Must login to RPA portion of the website



The screenshot shows the RPA.wi.gov website interface. At the top, there is a navigation bar with links for Home, Users, Stats, Help, and Log Out. The main heading is "Request Purchasing Authority" with the subtitle "Automated Approval of Special Purchasing Requests". Below this, there is a paragraph explaining the RPA system's purpose. Further down, there is a paragraph about the legal requirements for RPAs. At the bottom, there are two buttons: a blue button for "RPA (Waivers, Legal Service, Vehicle, Collecti All Agencies and Campuses)" and a purple button for "IT or Private Consultant Purchase over \$150,000 Agencies Only (no Campuses)".





School Safety Contracts Website

<https://SchoolSafetyContracts.wi.gov>

- This website was created in spring 2018 in conjunction with Governor Walker's \$100 million School Safety Plan ([EO 279](#))
- Directed SBOP to assist school districts by making available State contracts that provide security and safety supplies, equipment and services at competitively-bid prices and advantageous terms



STAR Piggybacking Request



Samples



Official

- Process:
 - Before filling out, check for mandatory contract, obtain waiver if needed
 - Fill out form (including section 5 if software purchase will impact STAR system)
 - Submit completed request to doadlprocplan@wisconsin.gov, include release if waiver was obtained
 - SBOP will assign a STAR contract number, if approved request is piggybacking on a UW contract

[DOA-3831: STAR Piggybacking Request](#)

[Example Piggyback Request Link](#)

[DOA-3047: Piggybacking Data Plan](#) (non-PeopleSoft agencies and UW entities)



Contract Renewal Analysis



- Tool created by SBOP, used to justify continued need of contract
 - Explain purpose/scope of contract; list main users, estimated annual spend & contract term
 - Conduct market research to validate the State is getting competitive pricing
 - Suggested sources for research: other states' contracts or consortium contracts, PPI/CPI, industry sources
 - Summarize negotiations, contract changes
 - Provide recommendation for moving forward
- Use the following links to check vendor status:
 - [Wisconsin Office of Contract Compliance Vendor Directory](#)
 - [Certification for Collection of Sales and Use Tax](#)

[Example Contract Renewal Analysis and Justification Link](#)



Questions?

THANK YOU FOR PARTICIPATING!



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