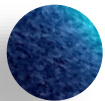


2021 Wisconsin Statewide Procurement Conference

The State of Wisconsin State Procurement





A Year in Review

Staffing

- We welcomed six new staff members to the Bureau:
 - **Matthew Capaul** – Procurement Specialist – CAPS
 - **Mark Simon** – Procurement Specialist – CAPS
 - **Anne Gerke** – Staff Development Program Specialist– WisPro
 - **Erin Schmitz** - Procurement Specialist – CAPS
 - **Kristina Harris** – Procurement Specialist – Enterprise Sourcing
 - **Patrick Muir** – IS Comprehensive Services Consultant/Admin– Enterprise IT Sourcing

Wisconsin Wins the Gold!

- Wisconsin took home the **Gold Cronin Award!**
 - We updated the standard configurations for the most frequently purchased computer models, achieving increased buy-in from agencies and greater discounts resulting in significant cost reductions
 - Project was a collaborative effort that included the State Bureau of Procurement agency and campus end users



Tondra Davis, Director

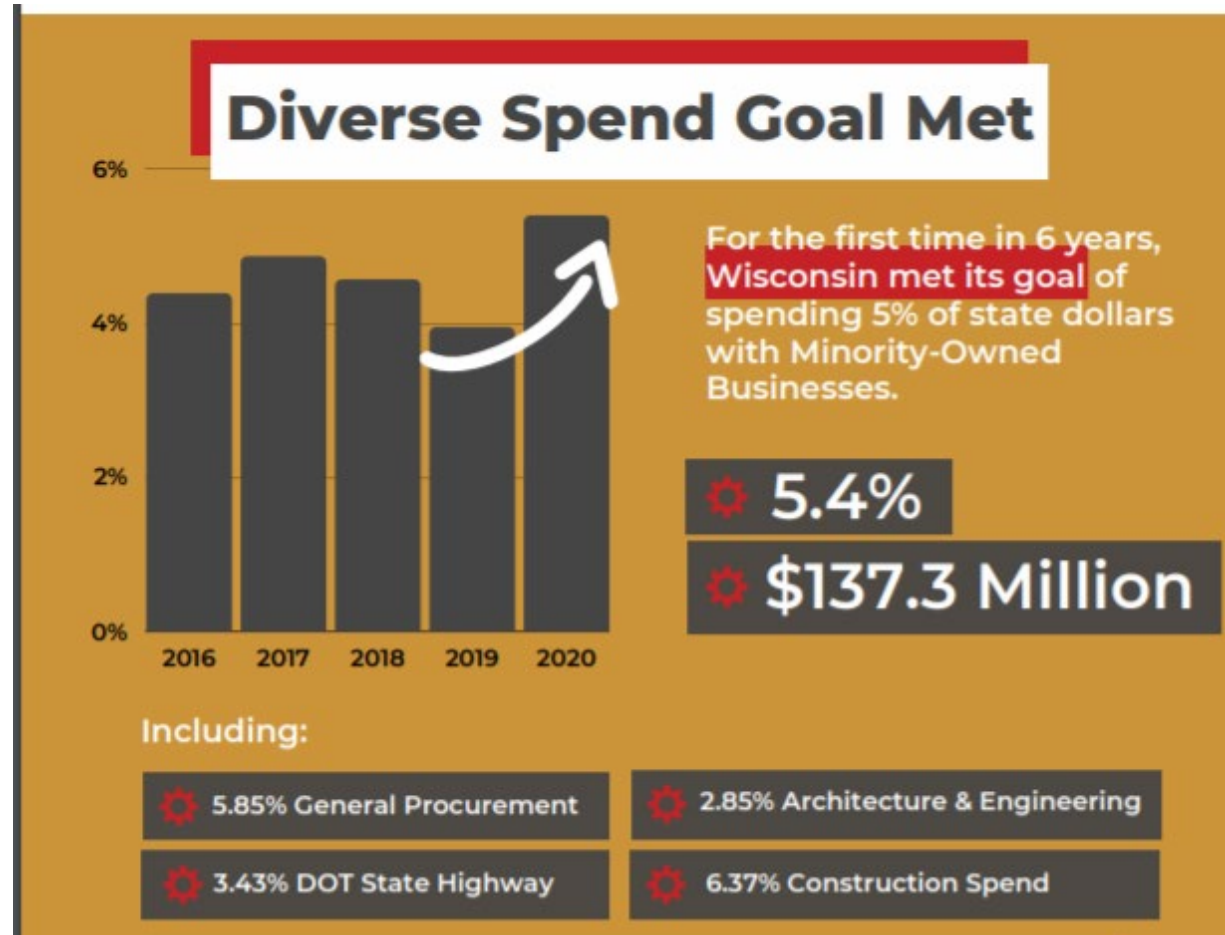


WISCONSIN
SUPPLIER DIVERSITY PROGRAM
Certifying Minority, Disabled Veteran and Woman Owned Businesses

Supplier Diversity Program

- **Certify Diverse Businesses to Give them a Better Opportunity to Do Business with the State of Wisconsin**
 - MBEs – Minority-Owned Business Enterprises
 - WBEs – Woman-Owned Business Enterprises
 - DVBs – Service-Disabled Veteran-Owned Businesses
- **State has goal of Purchasing 5% with MBEs and 1% with DVBs**

FY20: 5% MBE SPEND Goal Met for the first time in 6 Years!



FY20 - AGENCIES MEETING AND EXCEEDING DIVERSE SPEND GOAL > 5% DIVERSE SPEND

MILITARY AFFAIRS - 5.48%

PUBLIC DEFENDER - 10.45%

SUPREME COURT - 21.93%

SECRETARY OF STATE - 5.64%

EMPLOYEE TRUST FUNDS - 10.99%

FINANCIAL INSTITUTIONS - 23.83%

PUBLIC INSTRUCTION - 7.26%

ELECTIONS - 11.09%

COMMISSIONER OF INSURANCE - 25.34%

HIGHER ED AIDS BOARD - 7.90%

CORRECTIONS - 11.11%

WORKFORCE DEVELOPMENT - 25.66%

AGING - 8.44%

JUSTICE - 11.23%

AGR TRADE & CONSUMER PROT - 26.99%

GOVERNOR'S OFFICE - 9.43%

ADMINISTRATION - 12.02%

LEGISLATIVE TECH SVS - 32.28%

SAFETY & PROF SVS - 10.14%

TRANSPORTATION - 13.18%

INVESTMENT BOARD - 32.3%

CHILDREN & FAMILIES - 15.39%

THANK YOU!

KUDOS!

- **Procurement Staff**
 - Enterprise
 - State Bureau of Procurement
 - Deputy Director Matt Limoges
 - Director Cheryl Edgington



What Does the Future Hold for Supplier Diversity?

- **FY21**
- **FY22**
 - **KEEP OUR FOOT ON THE GAS!**
 - **LET'S DO IT AGAIN!!!**



Procurement Plan Automation

The screenshot shows a web application interface for Request Purchasing Authority. At the top is a navigation bar with links for Home, Users, Stats, Help, Log Out, and Admin. Below the navigation bar is the main heading "Request Purchasing Authority" with a subtitle "Automated Approval of Special Purchasing Requests". A paragraph explains that the RPA system provides a streamlined way for state agencies and UW campuses to submit, track, and receive approval for purchasing requests that fall outside normal competitive bid or purchasing processes. Another paragraph states that RPAs are required to support certain procurement transactions under current Wisconsin state law, with more information available in the State Procurement Manual or the RPA Practical Guide. A note indicates that IT or private consultant purchases over \$150,000 require approval of the DOA Secretary per Executive Order #288. A final note mentions that the Help tab includes links to additional information. Below the text is a grid of four buttons: "RPA (Waivers, Legal Service, Vehicle, Collectives) All Agencies and Campuses" (blue), "IT or Private Consultant Purchase over \$150,000 Agencies Only (no Campuses)" (purple), "Procurement Plan Procurement Plans for agencies and campuses" (red, highlighted with a yellow border), and "No Access to Procurement Service Request Procurement Service Request for CAPS Agencies" (grey).

Home Users Stats Help Log Out Admin

Request Purchasing Authority

Automated Approval of Special Purchasing Requests

The RPA system provides a streamlined way for state agencies and UW campuses to submit, track and receive approval for purchasing requests that fall outside normal competitive bid or purchasing processes.

RPAs are required to support certain procurement transactions under current Wisconsin state law. More information about RPAs and applicable policies and procedures can be found in the [State Procurement Manual](#) or in the [RPA Practical Guide](#) IT or private consultant purchases over \$150,000 require approval of the DOA Secretary per Executive Order #288.

The Help tab includes links to additional information.

- RPA**
(Waivers, Legal Service, Vehicle, Collectives)
All Agencies and Campuses
- IT or Private Consultant**
Purchase over \$150,000
Agencies Only (no Campuses)
- Procurement Plan**
Procurement Plans for agencies and campuses
- No Access to Procurement Service Request
Procurement Service Request for CAPS Agencies

- RPA.wi.gov
- Allows agencies to submit plans online
- Automated approval process
- Does not require a new role
 - Any person with the ability to submit RPAs can also submit Proc Plans

Training

- Transitioned the SBOP Training registration system to Cornerstone
 - Agencies access through PeopleSoft
 - UW access through external portal
- Created four new eLearning modules:
 - Procurement 101
 - Simplifying Signatures with DocuSign
 - What is eSupplier?
 - Purchasing Print for the State of Wisconsin





Upcoming Projects

Management Reviews

- We paused our management reviews due to resource restraints by both SBOP and agencies
- We hired an additional staff person to assist with the program
- We plan to re-establish a schedule for review and streamline the process by:
 - Taking advantage of information available in STAR
 - Transition the review from in-person to virtual



Training

- We will continue developing more eLearnings that can serve as just-in-time training for new employees and as refreshers for current employees
- Our intent is not to eliminate in-person offerings, but to reserve them for more complex topics that don't lend themselves to online training
- Currently in development:
 - Completing a CBA
 - Advanced Intro to Procurement
 - Strategic Sourcing
 - SS: Creating an Event
 - SS: Scoring & Awarding
 - Working with Procurement Systems
 - And many more!

Other Projects: Still on the List

Strategic Sourcing Enhancements

- Plan to convene an interagency workgroup to explore agency use of Strategic Sourcing
- Objectives of that project include:
 - Identify best practices
 - Develop training materials for use by all agencies
 - Create a feedback mechanism for continued improvements



Other Projects: Still on the List

RFP Template Refresh

- Need to create a workgroup within SBOP that can dedicate time to this project
- Goal is to update/refresh the template and align it with the RFB format
- Create a User Guide



Other Projects: Still on the List

Contract Management System

- SBOP is interested in obtaining a system that can serve as both a central repository and tracking system for contracts
- Attended an Oracle demonstration of Supplier Contract Management – very robust system beyond our current need
- Will work with STAR/DET on next steps



The background is a vibrant blue mosaic of irregular, semi-transparent shapes. At the top, three circular accents with a dark blue, textured pattern are spaced across the width. The overall shape of the mosaic is a wide, rounded rectangle with a slight dip in the center at the top.

Thank You!