

# Procurement Systems & Resources

Jessica Potter, WisPro Section Chief  
Anne Gerke, Procurement Training Specialist - Senior

## **Poll:**

Are you still working remotely?

- 100% Remote
- Hybrid
- 100% in Office

## Jessica Potter

- Section Chief, WisPro Resources & Special Programs
- With SBOP for almost 5 years
- I was the Senior Procurement Training Specialist until December 2020, when I was promoted to WisPro Section Chief
- Unlike the rest of SBOP, WisPro is responsible for SBOP's procurement resources, tools, trainings, and special programs

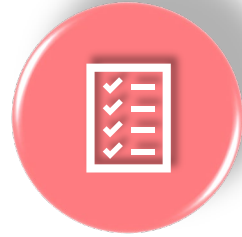
# Anne Gerke

- Senior Procurement Training Specialist, WisPro
- With SBOP for 6 months
- Responsible for everything related to procurement trainings, including converting some of the existing trainings to eLearnings or hybrid classes (*we'll discuss this later!*)
- Prior to joining SBOP, I was responsible for providing in-person trainings, conducting webinars, and developing eLearnings for clinical research orgs

# Agenda



DocuSign



Proc Plan  
System



SBOP Website



SPM Website



Procurement  
Trainings

# DocuSign eSignature

Contract Updates, Resources, and Access

## **Poll:**

Do you use DocuSign for work?

- Yes! As much as possible!
- Sometimes
- No, but I wish I did
- Doc-u-what?

# DocuSign: Contract Updates

## **Current Contract**

- Exp. 11/2021
- Unlimited envelopes
- Unlimited seats (accounts)
- Includes UW System campuses
- Payment included in agency's procurement assessment and based on agency's percentage of Ch. 16 spend

## **Anticipated Next Contract**

- Exp. 11/2022
- Unlimited envelopes or practically unlimited envelopes
- Unlimited seats (accounts)
- Includes UW System campuses
- Payment included in agency's procurement assessment and based on agency's percentage of Ch. 16 spend



# DocuSign: eNotary

- Electronic Remote Notary is now legal in Wisconsin; DocuSign is an approved method
- Available on an enterprise level only (not per agency account)
- \$15/envelope cost, with 1000 envelope bundle minimum (enterprise-wide)
- Discussing potential interest among agencies, campuses
  - If your agency/campus would be interested in using electronic remote notary services through DocuSign, please email me at [Jessica.Potter@wisconsin.gov](mailto:Jessica.Potter@wisconsin.gov)

# DocuSign: Resources

- SBOP's DocuSign User Guides ([Users](#), [Template Builders](#), and [Admins](#))
- Official [DocuSign User Guide](#)
- [DocuSign University](#) (available for anyone with a DocuSign account)
- DocuSign's [Support Page](#)
- DocuSign [Trust Center](#) (information about DocuSign's security)
- eLearning in Cornerstone: *Simplifying eSignatures with DocuSign*

# DocuSign: Access

- How do I get access?
  - Most agencies and campuses have DocuSign accounts already
  - Reach out to your agency/campus DocuSign Administrator, if you know who that is
  - Don't know who your agency or campus DS Admin is?
    - Contact me directly at [Jessica.Potter@wisconsin.gov](mailto:Jessica.Potter@wisconsin.gov) or my team at [DOAWisPro@wisconsin.gov](mailto:DOAWisPro@wisconsin.gov) and we'll get you in touch with appropriate DocuSign Admin
  - If your agency/campus doesn't have an account, I will work with you to discuss creating a new one



# DocuSign Questions?

# Proc Plan System

System Overview, Updates, and Resources

## Poll:

Do you ever submit Proc Plans?

- Yes - and I've submitted one in the new system already!
- Yes, but not in the new system yet
- Nope
- I have no idea what you're talking about

# Proc Plan System: Overview

- Launched in August 2021
- It's part of the Procurement Request Portal, at <https://rpa.wi.gov>
- All users who have access to submit RPAs also have access to submit Proc Plans
- Automated process, similar to how RPAs are submitted

# 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



# Procurement Plan

## Automated Approval of Agency and Campus Procurement Plans

**New PPlan**

Procurement Plans for agencies and campuses

**View PPlans**

Procurement Plans for agencies and campuses

# Add New PPlan Request

## Request

Enter the request basics. Once you fill out this form you can save it as a draft so you can come back to it later. Hover over a field's label to view help.

Agency

-- Select Agency --

Title of Procurement

Rush or Non Rush

Non Rush

Transaction Type

-- Select Transaction Type --

Eligible Users

-- Select Eligible Users --

Request Number

Agency Tracking Number

Program Contact

Contact Phone

Contact Email

Request Description

Initial Term

-- Select --

Number of Renewals

-- Select --

Renewal Term

-- Select --

Extended Term

Non Extended Term

Services and/or Goods

Non Service

Non Goods

IT or Non IT Request

Non IT Request

NIGP Codes

Type here to search for NIGP codes by number or description

[Save & Continue →](#)

# Draft Request PPlan-Agency Draft

Request Estimates **1** Documents **0** Finish History Notes **0**

Purchase Estimates - 1 Year's estimate is r

Year 2 Estimate \$ \$0.00 **+ Add**

## Yearly Estimates

Year 1 Estimate \$ \$1,000.00 **Delete**

**← Back** **Save & Continue →**

Request Estimates **5** Documents **1** Finish History Notes **0**

You can find blank forms here: Procurement Forms. Fill them out on your computer. Attach the completed version.

## Select File for Upload

Choose a file or drop it here...

Choose File

## Uploaded Documents

Document Name

Action

[22-5524 Proc Plan.docx](#)

**Delete**

# Draft Request PPlan-Agency Draft

Request Estimates **5** Documents **1** Finish History Notes **0**

Request is complete and ready for submission. **You can't edit the request after you submit it.** It won't be in drafts anymore.

**Submit Request**



**Withdraw Request**

Procurement Plan Approved - Message (HTML)

File Message Help Acrobat Tell me what you want to do

Find Zoom

### Procurement Plan Approved

 DOA DEO WIS Procurement  
To  Potter, Jessica - DOA

Reply Reply All Forward

Mon 10/25/2021 2:16 PM

Hello,

Your Procurement Plan ABC-12-345-Z for Awesome Sauce has been approved. Please login to the Proc Plan System to review or download the approval document for your records.

If you have additional questions, please contact [doawispro@wisconsin.gov](mailto:doawispro@wisconsin.gov).

# View PPlan Request

Filter/Search Requests by Keyword

Agency  Agency Tracking Number  Phase  Date Range

IT **Rush** **Clear All**

**Card View** **List View**

[12 Requests Match Filters](#)

**CHILDREN & FAMILIES, DEPT OF**

**PPlan-Agency Draft**

Agency Tracking Number  
437004-M23-0001908

PPlan Number  
PP100095

Title  
Child Support Modernization Design, Development & Implementation (DDI)

Description  
The Department of Children and Families (DCF) is beginning the process...

Created  
10/14/2021 4:08 pm

**View Details**

Last updated 10/14/2021 4:08 pm

**CORRECTIONS, DEPT OF**

**PPlan-Section Chief**

Agency Tracking Number  
8323

PPlan Number  
PP100094

Title  
Employment Support Services at correctional facilities (various)

Description  
The Department of Corrections (DOC), Division of Adult Institutions (D...)

Created  
10/14/2021 11:37 am

**View Details**

Last updated 10/14/2021 11:42 am

**CORRECTIONS, DEPT OF**

**PPlan-Approved**

Agency Tracking Number  
8629

PPlan Number  
PP100093

Title  
Shawano County

Description  
Division of Community Corrections (DCC) will be entering into an agree...

Created  
10/12/2021 11:39 am

**View Details**

Last updated 10/14/2021 11:54 am

**CORRECTIONS, DEPT OF**

**HEALTH SERVICES, DEPT OF**

**MILITARY AFFAIRS, DEPARTMENT OF**

**PUBLIC INSTRUCTION, DEPARTMENT OF**

**PPlan-Approved**

Agency Tracking Number  
PA220940

PPlan Number  
PP100092

Title  
Bulk chicken into WGR Chicken Nuggets, WGR Popcorn Chicken, and WGR Chicken Patties

Description  
The Department of Public Instruction (DPI) administers USDA Foods for ...

Created  
10/11/2021 1:06 pm

**View Details**

Last updated 10/13/2021 1:04 pm

# View Request

Request

Estimates **4**

Documents **2**

Notes **1**

Progress

History

Print

Agency	PUBLIC INSTRUCTION, DEPARTMENT OF
Transaction Type	RFB for Services
Title of Procurement	Bulk chicken into WGR Chicken Nuggets, WGR Popcorn Chicken, and WGR Chicken Patties

# View Request

Request

Estimates **4**

Documents **2**

Notes **1**

Progress

History

Print

Download Request File PDF

## Procurement Plan Approval

**Agency:** PUBLIC INSTRUCTION, DEPARTMENT OF

**TransactionType:** RFB for Services

**Title of Procurement:** Bulk chicken into WGR Chicken Nuggets, WGR Popcorn Chicken, and WGR Chicken Patties

**Agency Tracking Number:** PA220940

**Request Number:** PP100092

**Program Contact:** Jessica Oele

**Contact E-Mail:** dpisnusdafoods@dpi.wi.gov

**Request Description:** The Department of Public Instruction (DPI) administers USDA Foods for eligible child nutrition programs. In an effort to ensure the most efficient and economical use of USDA Foods, DPI utilizes the Request for Bid procedure to select a vendor to process USDA donated trucks of bulk chicken into WGR Chicken Nuggets, WGR Popcorn Chicken, and WGR Chicken Patties. The WGR Chicken Nuggets, WGR Popcorn Chicken, and WGR Chicken Patties will be offered out to all schools participating in the State Processed-Products program. Schools will serve the product to children participating in the Child Nutrition Programs. DPI will pay the processing fees initially and recover the expenses from the schools through our invoicing process. Currently, there is no State of Wisconsin agency that can provide this service for DPI.

**Initial Term:** 1 Year

**Renewal Term:** 1 Year

**Number of Renewals:** 3

**Estimated Total Dollar Amount:** \$3,120,000.00

Routing Order	Approved	Date
Director or Designee, State Bureau of Procurement	x	10/13/2021

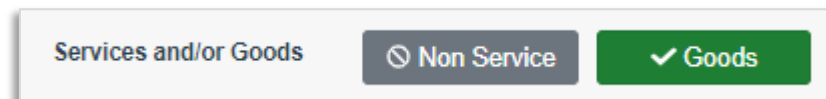
# Proc Plan System: Updates

- **Recent Updates:**

- Updated the routing for UW's IT plans, since they follow a different procedure and don't require DET to sign off on them
- Update on the Estimates tab to require at least 1 estimate to be entered before being submitted

- **Potential Updates:**

- Considering the possibility of making some quality of life updates to the main Proc Plan page (e.g., changing how the checkboxes/flags work)





# Proc Plan System: Resources

- [Proc Plan System User Guide](#)
  - Available on the [Procurement Request Portal Help](#) page and on the SBOP website ([SBOP](#) > State Agencies & Campuses > Procurement Request Portal)
- Send ideas for potential updates to me at [Jessica.Potter@wisconsin.gov](mailto:Jessica.Potter@wisconsin.gov)
- For technical assistance or to report issues, email WisPro at [DOAWisPro@wisconsin.gov](mailto:DOAWisPro@wisconsin.gov)



# Proc Plan System Questions?

# SBOP Website

Getting the Most Out of the Website:

<https://doa.wi.gov/procurement>



**In the chat:**

Name a resource you can find on  
the SBOP website.

# State Bureau of Procurement

The State Bureau of Procurement (SBOP) is part of the Wisconsin Department of Administration and administers the procurement laws, policies and procedures of the state on behalf of all agencies and campuses.



State Agencies & Campuses



Suppliers



Municipal Governments



Policy & Forms



Special Programs



Resources

Contract Tools



Announcements



Contact Us



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# SBOP Website Questions?

# State Procurement Manual Website

Overview, Resources, and Helpful Tips

<https://doa.wi.gov/ProcurementManual>

## **Poll:**

How comfortable are you looking up information on the SPM website?

- I'm a pro – you name it, I can find it!
- I can fumble my way into the right spot.
- I'm not so great at finding things, but I know who to ask.
- I'm completely lost!



# State Procurement Manual Home

The State Procurement Manual is your guide to statewide policies and procedures for obtaining materials, supplies, equipment, contractual services and all other items of a consumable nature, primarily covered under the authority of Ch. 16, Wisconsin Statutes. The State Bureau of Procurement issues the Manual and updates it as necessary. Effective August 15, 2019 (compliance effective date of September 16, 2019), the Manual has been refreshed with new content and organizational structure. See the 'Revision History' tab or contact us with any questions about this change.

Cheryl Edgington, Director  
State Bureau of Procurement

## Search Procurement Manual

100-Series:  
Introduction & Procurement  
Fundamentals



200-Series:  
Planning & Procurement  
Strategy



300-Series:  
Competitive Solicitations



400-Series:  
Contract Administration &  
Transactions



500-Series:  
Exceptions, Waivers & Special  
Handling



600-Series:  
Administrative Policy

Procurement Information Memoranda (PIMs)



State Agency Purchasing Directory



Other Resources



Revision History





# SPM Website Questions?

# Procurement Trainings

Updates, Long-Term Plans, and an Overview of  
How SBOP's Approaching Trainings

**In the chat:**

What key words or phrases  
would you use to describe  
“Virtual Training?”

# Prescription for a Healthy Virtual Training

- Highly interactive
- LIVE, Online, Synchronous instructor-led
- Instructor and Learners in different locations
- 60-90 minutes
- Under 20 participants



# Synchronous & Asynchronous Training

## Synchronous

- Learning event where students are engaging in learning at the same time
- “Real-time” learning
- Think instant messaging, chat rooms, video conferencing

## Asynchronous

- Learning event where students are learning off-line or at their own pace
- Coursework delivered via web
- Think email, message boards, online

## **Poll:**

What does the acronym “ILT” stand for?

- a) Individual Learning Topic
- b) Instructor-Led Training
- c) Independent Living Training
- d) Interactive Learning Training

# Training Formats



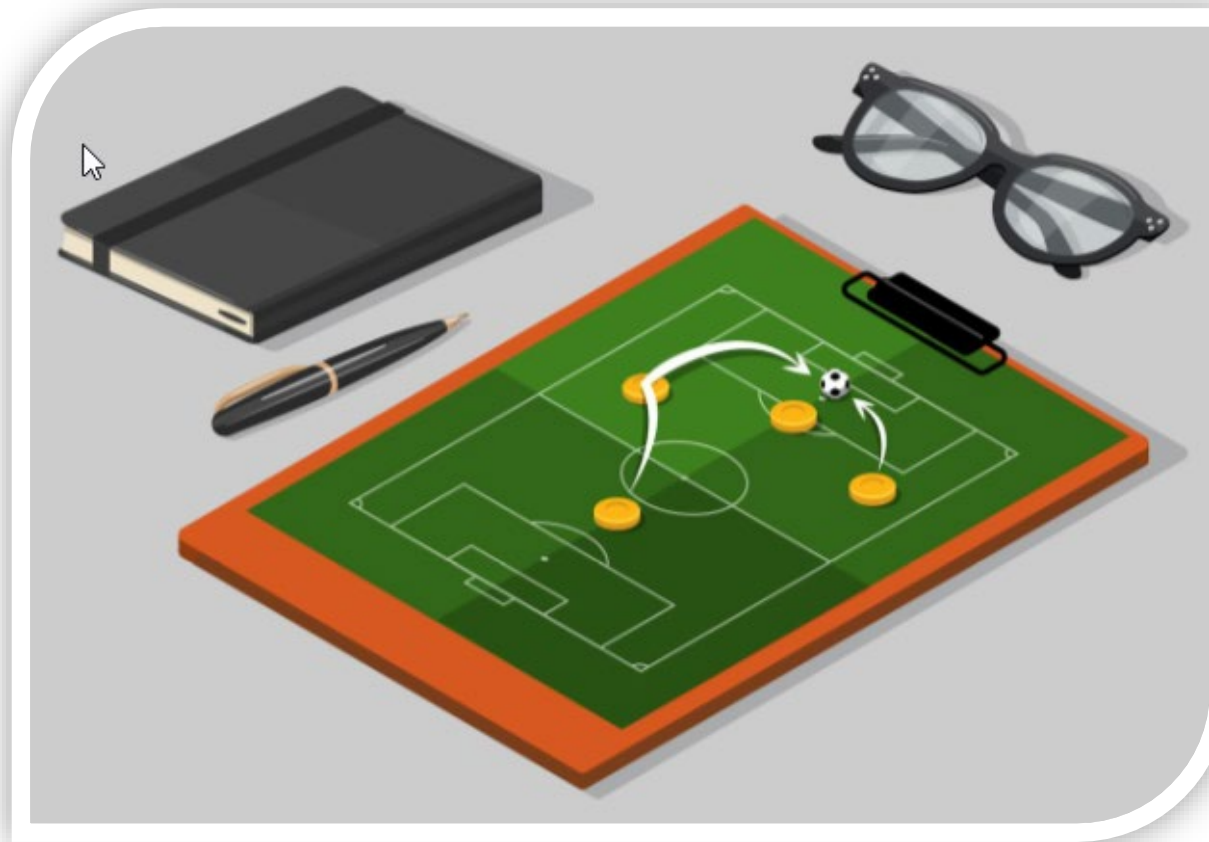


# Best Practices are Like a Maze...



# Expectations

Define your goal, design, plan for, and communicate expectations



# Plan for the Unexpected

Over-prepare for unexpected events, stay calm when they occur, and manage them gracefully



# Engage Participants

Design relevant, interactive virtual training sessions




# Engage Participants

Virtual Training is not a time to sit back and watch like you're at a movie...

...it should be engaging and interactive for the presenter and especially for the learner!





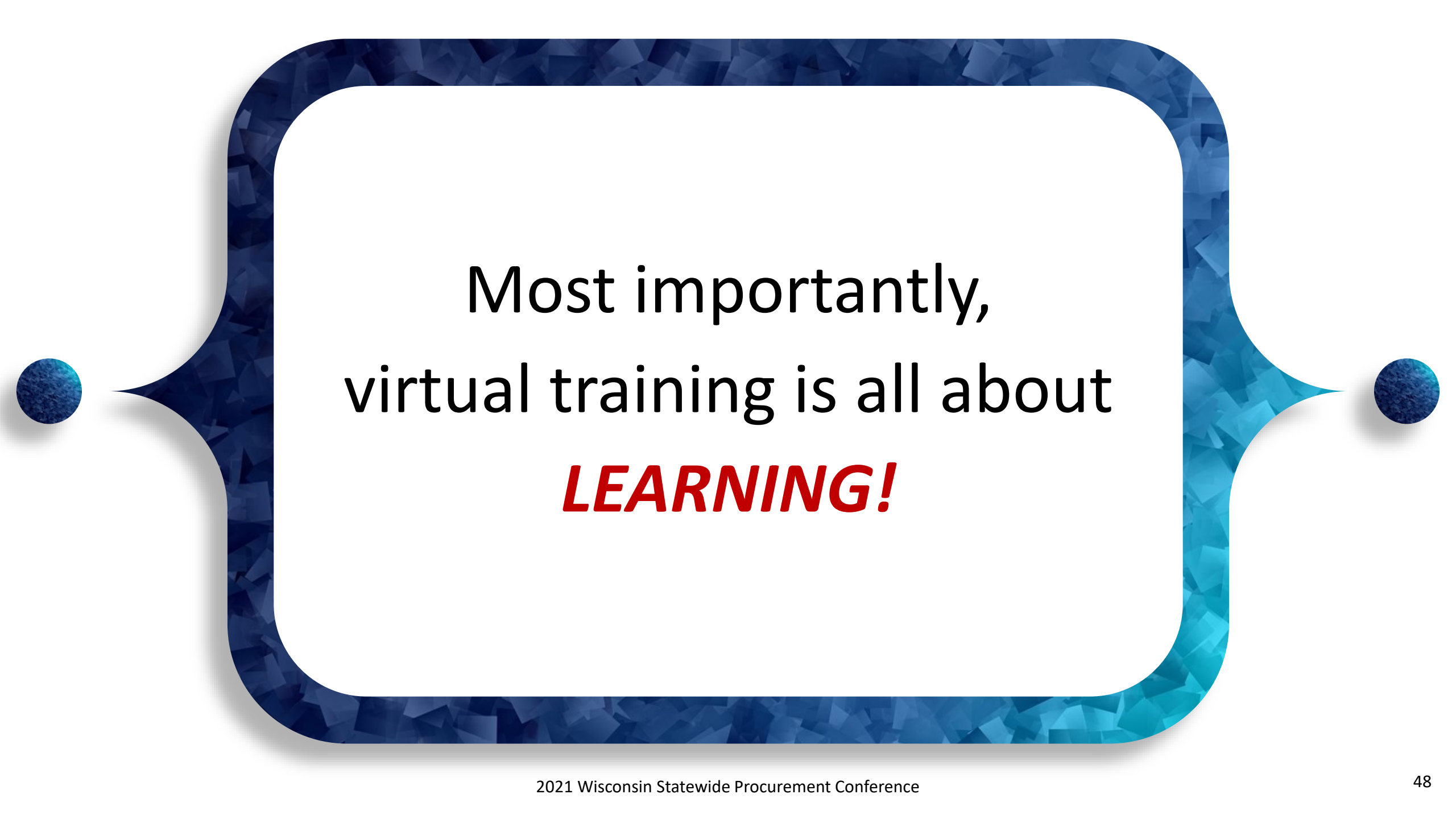
*“Think out of the box and create a learning experience where the learner can interact with the content and their brains.”*

Rosalie Ledda Valdez,  
Knowledge Management

# Virtual Training is All About...

- Participants ***learning*** knowledge or a new skill
- Participants ***engaging*** with the facilitator and attendees while connecting together in their learning journey
- Participants ***changing their behavior*** back on the job as a result of what they've learned





Most importantly,  
virtual training is all about  
***LEARNING!***



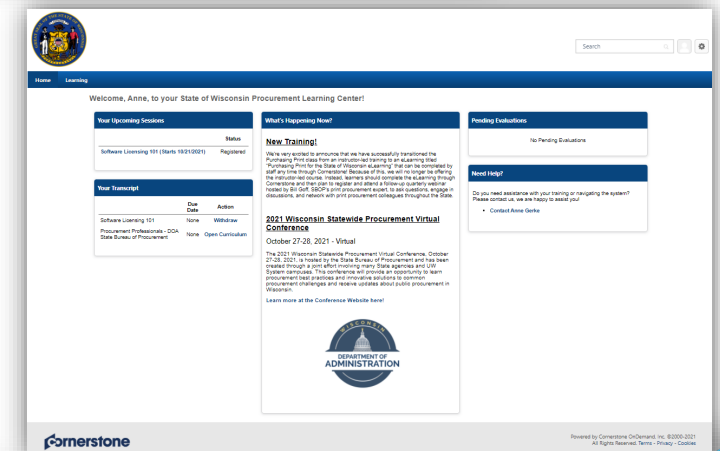
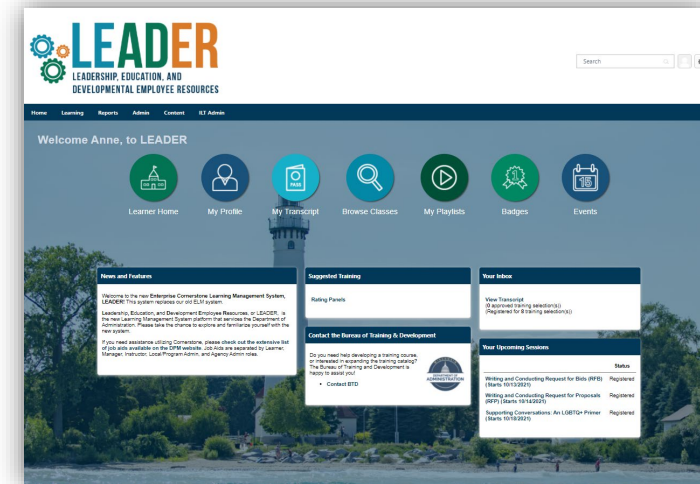
## Poll:

How comfortable are you with finding procurement trainings in Cornerstone/LEADER?

- a) I'm a pro – I use Cornerstone/LEADER all the time!
- b) It takes me a bit, but I can find what I'm looking for
- c) I typically need to ask someone for help
- d) I've never used Cornerstone/LEADER

# Procurement Trainings: Cornerstone

- Class registrations moved to Cornerstone in September 2021
  - Agencies register for classes through the [HR Self-Service Portal](#) (timesheet system)
  - UW Systems register for classes using the [UW System Cornerstone External Portal](#)
  - Municipalities can register for classes using the [Municipality Cornerstone External Portal](#)



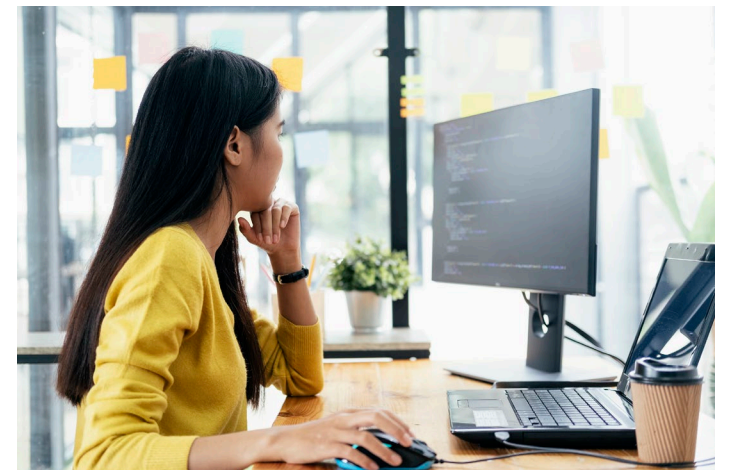
# Procurement Trainings: Cornerstone

- Cornerstone allows for more automation
  - Waitlists
  - Class communications
  - Handout and slide distribution
  - Curriculum development
- Allows us to host eLearnings



# Procurement Trainings: Long-Term Plans

- Hybrid classes
  - Rework existing courses
  - Convert what makes sense into eLearnings; require completion before attending instructor-led classes
  - Follow up with instructor-led classes or webinars to allow for discussion, exercises, more real world/meaningful learning



# Procurement Trainings: Long-Term Plans

- Recommended Learning Paths
  - Create bundles of trainings (“curriculums”) within Cornerstone
  - Designed to address specific needs, job requirements
  - Intended to make it easier for learners to identify what trainings they need to take



# Procurement Trainings: Long-Term Plans

- Expanded eLearning library
  - Offer training on additional topics through eLearnings
  - Short, concise information, best practices
  - On-demand learning, can be taken on individual's timeline
  - Ability to expand audiences
    - Could offer eLearnings for evaluation committees, standards committees, SMEs, non-procurement staff, bidders, vendors, others

# Procurement Trainings: eLearnings

- **Current eLearnings available to agency & campus staff:**
  - Procurement 101: An Introduction to All Employees
  - eSupplier Training
  - Simplifying eSignatures with DocuSign
  - Purchasing Print for the State of Wisconsin (*replaces in-person class!*)

# Procurement Trainings: eLearnings

- **Currently in-progress & in various stages of review:**
  - Advanced Procurement: Putting it All Together
  - Completing a Cost Benefit Analysis
  - Creating a Strategic Sourcing Event (Parts 1 & 2)
  - Working with Procurement Systems
  - Building & Maintaining Procurement Files
  - *And others!*



# Procurement Trainings: eLearnings

- **Planned for future development:**
  - Working with Bidders/Suppliers
  - Working with Subject Matter Experts
  - Managing Communications During a Solicitation
  - Contract Handoffs
  - Waivers (types, when to request, how to request)
  - Procurement Protests
  - *And more!*



**In the chat:**

What additional eLearning topics should we consider developing?

# Questions?

**Jessica Potter:** [Jessica.Potter@wisconsin.gov](mailto:Jessica.Potter@wisconsin.gov)

**Anne Gerke:** [Anne.Gerke@wisconsin.gov](mailto:Anne.Gerke@wisconsin.gov)

**WisPro Help Desk:** [DOAWisPro@wisconsin.gov](mailto:DOAWisPro@wisconsin.gov)