



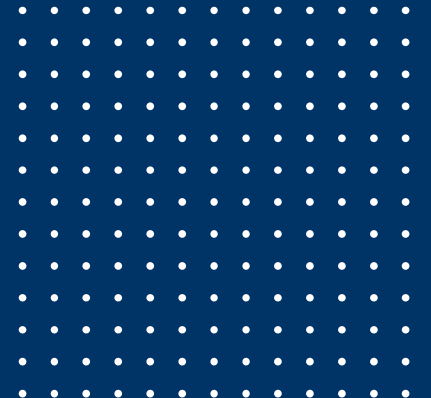
THE BENEFITS OF COLLABORATIVE CONTRACTING



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What are the different types of Collaborative Contracting?

Use Chat





Collective Purchasing Piggybacking Cooperative Purchasing

Collaborative Contracting - Visual Guide





What is Collective Purchasing?

➤ Collective Purchasing is...



Another
State

Federal
Government

Wisconsin
Municipality

Regional or
National
Consortium



When is Collective Purchasing Worthwhile?



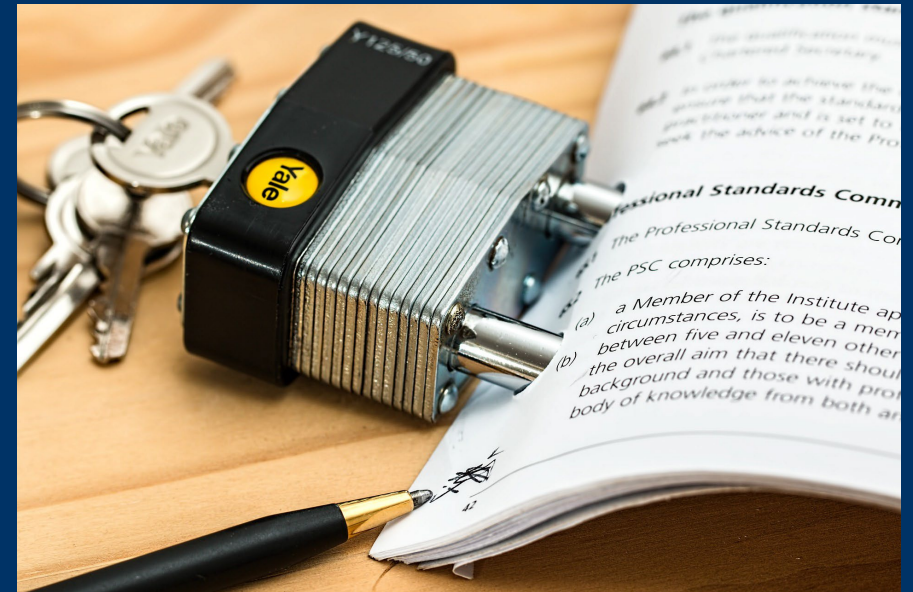
- Contract is active and open for use
- Pricing is favorable
- A competitive process was used
- Protest/appeal resolved or addressed
- Scope meets the need
- T&Cs are acceptable



Collective Purchasing: What Type of Contracts Can Be Used?



- Other State's contracts
- Wisconsin municipalities
- Nonprofit consortium contracts



Exceptions: What Type of Contracts are Limited Use or Not Allowed?

- Federal Government contracts (limited)
- Non-Profit Organizations (limited)
- Other State's Municipalities





Collective Purchasing Examples

SVAR Quick Guide (VendorNet)

- NASPO Copier Equipment and Related Services, [505ENT-M20-MFDCOPIER-00](#)
- NASPO Software VAR Contract, [505ENT-M21-NASPOSVAR-00](#)
- NASPO Public Safety Communications Products, Services and Solutions, [505ENT-O22-SAFETYCOMM-00](#)



RPA Requirements

- Complete form [DOA-3046](#) Request for Purchasing Authority (RPA):
 - Sections 1, 2 and 4
- Complete form [DOA-3044](#) Collective Purchasing to certify it meets the requirements in [PRO-502](#)
- Review the [RPA Checklist](#) to verify all documentation is completed

Section 9: RPA Required Components Checklist: Agency will complete this section to confirm the package is complete by noting a check (X) or "N/A" as appropriate. Documentation required for each RPA type is noted accordingly.

Agency Check Here	Documentation	RPA Amendment	Waiver	Collective	Vehicle	Legal Service
<input type="checkbox"/>	Completed and signed form DOA-3046, Request for Purchasing Authority (RPA) <i>PRO-210</i>	X	X	X	X	X
<input type="checkbox"/>	Completed form DOA-3044, Collective Purchasing <i>PRO-502</i>			X		
<input type="checkbox"/>	Completed form DOA-3821A, Justification of Need and Cost Benefit Analysis Project Summary (as applicable for contractual services only) <i>PRO-205</i>	X	X	X		X
<input type="checkbox"/>	Copy of public/legal notice; for sole source waiver, public notice must contain the name of the proposed sole source supplier <i>PRO-210</i>		X			X
<input type="checkbox"/>	Copy of RPA to be amended <i>PRO-210</i>	X				
<input type="checkbox"/>	Vehicle Request form DOA-3016 <i>PRO-506</i>				X	
<input type="checkbox"/>	Proposed Contract <i>PRO-511</i>					X





Individual Agency Use of NASPO Contracts

- State Agencies can use NASPO contracts, and do their own Participating Addendum, via RPA approval
- State Bureau of Procurement Director needs to approve it as well
- The agencies need to negotiate the Participating Addendum
- Terms specific to their agency need to be included
- Renewal process needs to be followed





What is Piggybacking and How Can It Save Time and Resources?

➤ Piggybacking is...





“Tests” of Piggybacking

- Scope meets the need
- Contract is open and active
- Supplier is offering the same or better terms and pricing





Piggybacking: What's Not Allowed?

- Term cannot extend beyond that of the originating contract
- Sole source contracts cannot be used
- Contract cannot be used to procure services or goods outside the original scope
- Piggybacking DOES NOT apply to contracts established by quasi-governmental entities
 - Wisconsin Economic Development Corporation (WEDC) and Wisconsin Housing and Economic Development Authority (WHEDA), who are considered municipalities for purposes of procurement rules.



Piggybacking Examples & Forms

- Purchasing off a UW contract
- Purchasing off an Agency Contract
- STAR Piggybacking Request
 - State agencies, [DOA-3831](#)
 - UW campuses or non-STAR agencies, [DOA-3047](#)

STATE OF WISCONSIN
DEPARTMENT OF ADMINISTRATION
DOA-3831 (R06/2022)
S. 16.71 WIS. STATS



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

STAR Piggybacking Request

Instructions: Send the completed form via e-mail to: doadprocplan@wisconsin.gov

Section 1: Agency Requesting Piggyback			
Agency Requesting Piggyback:		Agency Business Unit Number:	
Agency Contact Name:	Phone Number:	E-Mail Address:	
<input type="checkbox"/> My agency has notified the Originating/Contracting Agency identified in Section 2 below that we intend to use their contract and they have agreed.			

Section 2: Originating/Contracting Agency			
Originating/Contracting Agency:		Agency Business Unit Number:	
Originating/Contracting Agency Contact Name:	Phone Number:	E-Mail Address:	

Section 3: Contract Information		
Contract Number	Supplier Name	Supplier ID Number
Commodity/Service Codes:		Estimated Annual Spend: \$
Is the purchase of software included in this request? If "yes", complete Section 5 below. Yes <input type="checkbox"/> No <input type="checkbox"/> N/A <input type="checkbox"/>		

Section 4: Eligibility Check		
<input type="checkbox"/> My agency has validated the following, in compliance with the requirements of the State Procurement Manual, PRO-502.		
<input type="checkbox"/> Contract is Open	Contract Effective Dates:	Renewal Options:
<input type="checkbox"/> Competitively Bid	Request for Bid/Proposal Number:	
<input type="checkbox"/> Supplier(s) is/are not on the Certification for Collection of Sales and Use Tax Ineligible Vendor Directory		
<input type="checkbox"/> Supplier(s) is/are not on the Contract Compliance Ineligible Vendor Directory		
Impact, if any, on any minority business enterprise, disabled veteran-owned business or work center:		
<input type="checkbox"/> Contract scope matches my agency's need.		
Description of the scope of the original procurement and how it corresponds to the commodity/service to be purchased:		





What is Cooperative Purchasing?

Cooperative Purchasing is...





How Can Cooperative Purchasing Work for You?

- Resource sharing
- Accomplishing long-term goals or initiatives
- Fulfilling mission statements
- Achieving uniform specifications
- Establishing more viable contract options



Cooperative Purchasing Examples

- Two or more agencies working together to develop a solicitation, each agency is named in the solicitation
- An agency (or multiple agencies) working together with a WI municipality or municipalities
- Working with other states or the Federal government
- An agency, establishing a contract for WI municipalities to use




**COLLABORATING
LEADS TO SUCCESS**




How Can We Help Each Other?

- Include form ([DOA-3832: Bidder Required Form](#)) in all solicitations to encourage bidders to agree to extend pricing and terms to Wisconsin municipalities
- Include piggyback language in solicitations
- When conducting joint procurements, include each agency in the Procurement Plan



STATE OF WISCONSIN
DEPARTMENT OF ADMINISTRATION
DOA-3832 (R 07/2019)
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Bidder Required Form

Instructions: Bidder is required to complete all sections of this form. (Note: If the agency checks the box preceding Section 5 indicating that section is not applicable to the bid/proposal, Bidder may skip Section 5. Bidder may not skip any other sections of this form).

To be completed by the agency:

Agency Name	Solicitation Title	Solicitation Reference Number
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Section 1: Bidder Information

Bidder/Proposer Company Name:

E-Mail Address:

Phone Number: Toll Free Phone: Fax:

Address:

City: State: Zip:

Mailing Address for Purchase Orders (if different than above)


Address:

City: State: Zip:

Section 2: Bidder Contacts

List the name and title of the person to contact for questions related to each of the topics below:

Bid/Proposal	Phone:
Email:	
Affirmative Action Plan	Phone:
Email:	
Orders and billing	Phone:
Email:	





How Do I Get Approval?

- Collective:
 - If the supplier is another state government or municipality, submit a Procurement Plan form [DOA-3720](#)
 - Otherwise, submit an RPA using form [DOA-3046](#)
 - Include form [DOA-3044](#) with the request
- Piggybacking:
 - STAR agencies use form [DOA-3831](#)
 - UW campuses or non-STAR agencies use form [DOA-3047](#)
- Cooperative:
 - Procurement Plan form [DOA-3720](#)





Resources

- [Collaborative Contract Visual Guide*](#)
- Link to UW System and UW-Madison Contracts
 - https://www.busserv.wisc.edu/puct/main_menu.aspx
 - <https://www.wisconsin.edu/procurement/contracts/>
- VendorNet for State Agencies and STAR under transactional contracts
 - <https://vendornet.wi.gov/Contracts.aspx>
- Communicate with Peers
 - Reach out to other Agencies
 - Use IPC or SAPC
- Other State's Procurement Websites

*Attached as a resource on Conference website





Questions?

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Susanne Matschull: susanne.matschull@wisconsin.gov

Patrick Muir: patrick.muir1@wisconsin.gov

