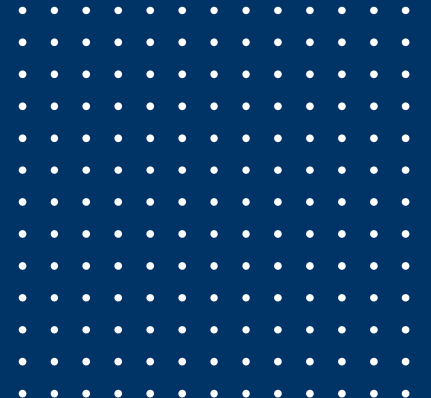




2023 Wisconsin State Procurement Conference

The State of State Procurement



DOA Secretary Kathy Blumenfeld



DOA Secretary Kathy Blumenfeld is a leader with extensive experience in the financial services industry, business, and government.

She was appointed by Governor Tony Evers to lead the Department of Administration in January 2022, and previously led the Wisconsin Department of Financial Institutions.

As Secretary, she is committed to developing caring and diverse teams that are passionate about their jobs and providing great customer service to Wisconsin residents, partners, and agencies.

She began her career as a Certified Public Accountant, is the author of three books, and is passionate about community service, philanthropy, and tennis.





WISCONSIN SUPPLIER DIVERSITY PROGRAM

Certifying Minority, Disabled Veteran and Woman Owned Businesses

Tondra Davis, Director



What We Do

- Certify Minority-Owned (MBE), Women-Owned (WBE), and Veteran-Owned (DVB) Businesses
- Tabulate Wisconsin's Diverse Spend with MBEs and DVBs
 - 5% Spending Goal with MBEs
 - 1% Spending Goal with DVBs



How Did WI Do in FY21?



Set Records

- 2nd Time – Met MBE Goal 2 Years in a Row
- 6.34% Diverse Spend
- \$192M Diverse Spend





5% - 24% Diverse Spend

▪ Department of Children & Families	19.08%
▪ Safety and Professional Services	17.87%
▪ Board on Aging & Long-Term Care	17.83%
▪ Department of Transportation	15.56%
▪ Department of Employee Trust Funds	15.29%
▪ Lower WI State Riverway Board	12.89%
▪ Department of Justice	10.80%
▪ People with Developmental Disabilities	8.26%
▪ Historical Society	8.11%
▪ Office of the Governor	7.27%
▪ Public Defender Board	7.14%
▪ Department of Public Instruction	7.04%
▪ Child Abuse and Neglect Prevention Board	6.98%
▪ Department of Natural Resources	6.67%
▪ Public Service Commission	5.63%
▪ State Fair Park Board	5.60%
▪ Department of Corrections	5.30%



> 25% Diverse Spend



▪ Department of Workforce Development	70.58%
▪ Legislative Technology Services Bureau	50.49%
▪ Department of Financial Institutions	35.59%
▪ Commissioner of Insurance	32.98%
▪ Investment Board	29.84%
▪ Elections Commission	27.24%
▪ Dept. of Agriculture Trade & Consumer Protection	26.99%
▪ Supreme Court	26.34%



Continued Success

- [SupplierDiversity.wi.gov](https://www.supplierdiversity.wi.gov) – Database of Diverse Suppliers
- Tracking and Entering 2nd Tier Diverse Spend
- Validating Monthly Diverse Spend



2022 in Review



Staffing



- We welcomed five new staff members to the Bureau:
 - **Kathy Bergh** – CAPS Section Chief
 - **Alice Tian** – Procurement Specialist – WisPro
 - **Laura Bergum** – Procurement Specialist – IT Sourcing
 - **Becky Hoefs** – IT Sourcing Section Chief
 - **Heather Strong** – Procurement Specialist – CAPS
- And, **Leann McGowan** was promoted to Enterprise Sourcing Section Chief



Large, High-Risk IT Contract Review Process



The screenshot shows the RPA web application interface. At the top, there is a navigation bar with links for Home, Users, Stats, Help, Log Out, and Admin. 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 and another paragraph mentioning state law and references to the State Procurement Manual and RPA Practical Guide. A note indicates that the Help tab contains additional information. Four main buttons are displayed: "RPA (Waivers, Legal Service, Vehicle, Collectives) All Agencies and Campuses" in blue, "High-Risk (Approval of Large, High-Risk IT Contract) Agencies Only (no Campuses)" in purple (highlighted with a green border), "Procurement Plan Procurement Plans for agencies and campuses" in maroon, and "No Access to Procurement Service Request Procurement Service Request for CAPS Agencies" in light gray.

- Launched in March 2022 via RPA.wi.gov
- Requires executive branch agencies to submit to DOA for review and approval any contracts, change orders, or amendments that involve a large, high-risk IT project as defined by DET
- As of December 31, we have approved 52 requests
- [PIM 22-001](#) for more information on the policy and process for submitting requests



Training



- Posted nine new eLearning modules including:
 - Creating a Sourcing Event
 - Scoring and Awarding Sourcing Events
 - Working with Procurement Systems
 - Guide to Using a Purchasing Card
 - Writing Solicitation Specifications
 - Special Procurement Programs including Federal Surplus

- All SBOP trainings offered through Cornerstone



Looking Ahead



Management Reviews



- We updated the checklists to align with requirements outlined in new State Procurement Manual
- We revised the process by:
 - Transitioning the review from in-person to virtual
 - Taking advantage of information available in STAR
 - Updating documentation
- Our goal is to resume management reviews in 2023 with a focus on improvement recommendations



Training – In Development



General Topics

- Practical Guidance: Submitting Waivers
- Creating a Requisition
- Software Licensing
- Negotiation Skills
- Piggyback contracts

Solicitation Topics

- Simplified Bidding
- RFB/RFP Overview (completed before ILT course)
- Conducting Bidder Outreach
- Building and Maintaining Procurement Files
- Procurement Protests
- Working with Procurement SMEs
- Participating on an Evaluation Committee



If you have any questions or ideas for new trainings, please contact Anne Gerke at Anne.Gerke@wisconsin.gov.



Other Projects



Procurement User Group

- SBOP, in conjunction with STAR, will reconvene PUG
- Currently updating the distribution list and surveying attendees on frequency

Strategic Sourcing

- Plan to convene an interagency workgroup to explore agency use of Strategic Sourcing
- Objectives include:
 - Identify best practices
 - Develop new and refresh existing training materials
 - Create feedback mechanism for continued improvements

Template Refreshes

- A cross sectional team in SBOP started work on the RFB template last year
- As soon as it is final, we will begin work on a new RFP template



Thank You!

