

Contracts Are Like a Box of Chocolates

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Agenda

- Contract Life Cycle
- Personnel and Resources
- Monitor the Contract
- Issue Resolution
- Tools and Resources



Using Chat...

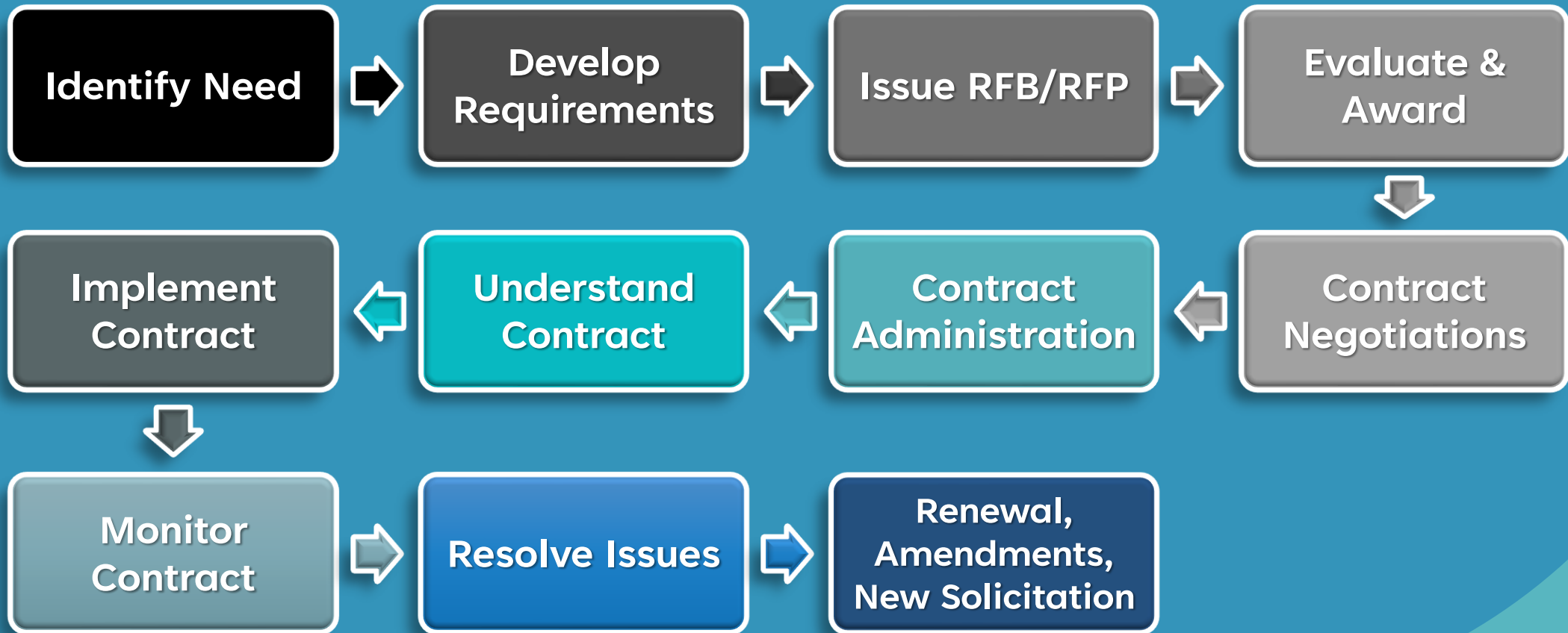


Contract Life Cycle

We need to buy something.
How does a contract happen?



Contract Life Cycle



Understand Contract



Understand Contract

Understand

Understand Contract

- Scope
- Implementation / Project Plan
- Technical Specifications
- Performance Benchmarks
- Timeline (Term)
- Reporting Requirements

Implement Contract



Implement Contract

Implement

Implement Contract

- Vendor and End User Meetings
- Training Contract Parameters
- Inspections
- Contract Transition

Personnel & Resources

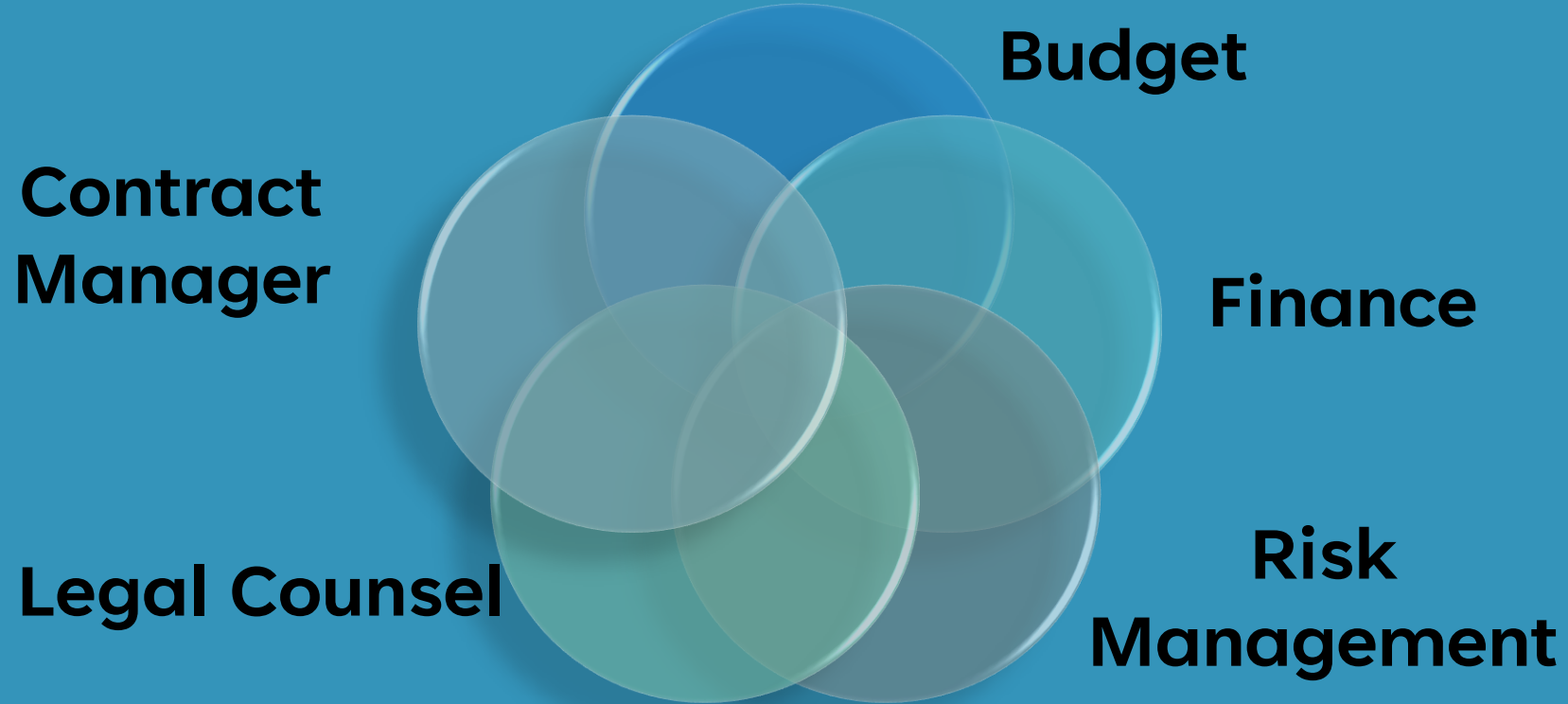


Polling Slide

In your current role, how do you use Contracts:

- Purchase products using existing contracts
- Issue Requests for Bids or Proposals
- Advise on budget, legal or other issues
- Oversee purchasers
- Other

Resources



Who is involved?

**Program/Contract
Manager**

**Purchasing/
Contract
Administrator**

**Program
Management**

End Users

**Prime & Sub-
Contractor**



Contract Administration



Administrator	vs.	Manager
No signature authority for amendments or renewals	vs.	Procurement signature authority
Cannot terminate contract	vs.	Responsibility to renew and terminate contract
Day to day program management and program expert	vs.	Contract and procurement “process” expert



Contract Administrator

- Ensures contract is followed
- Manages program served by contractor
- Ensures contract is followed
- Consults with Contract Manager as issues arise
 - Documents non-performance
- Involved in defining scope of services, qualifications, specifications



Contract Manager

Oversees all aspects of procurement process:

- Reviews and issues RFB/RFP
- Facilitates negotiations and awards contract
- Handles protest and appeals
- Reviews contract
- Manages updates
- Involved in problem resolution
- Handles termination
- Acts as liaison between CA and DOA procurement oversight, agency legal



The Scenario

You will learn about these steps as we go in-depth later in this presentation

Taycheedah Correctional Institution is hosting a family day for residents and will need 800 more sporks than usual for the event.

- Susan is the Contract Administrator
- Anna is the Contract Manager
- The contract is for Food Service Disposables
- The vendor is Sporks-R-Us

Where does Susan find information

When does Anna get involved

What other resources might be involved

Monitor the Contract



Know Your Contract

- Read all contract documents
- Know the specifications and mandatory requirements
- Know your vendors
- Know your resources



Monitoring Deliverables

Commodities

- Quality
- Delivery schedules
- Warranty
- Customer service standards (e.g., response time)

Services

- Implementation / work plans (e.g., milestones, deliverables)
- Quality assurance and corrective action plan
- Contingency plan
- Performance Metrics (e.g., operate without failure X%, for X consecutive days)

Monitor Your Vendors

- Meet with vendors
- Track spending
- Monitor performance
- Get feedback from end users



Document, Document, Document

- Documentation can help you:
 - Create better contracts
 - Become a subject matter expert
 - Be proactive and address things before they become issues
 - Determine if the contract is meeting needs
- When using someone else's contract, your feedback is vital



Issue Resolution



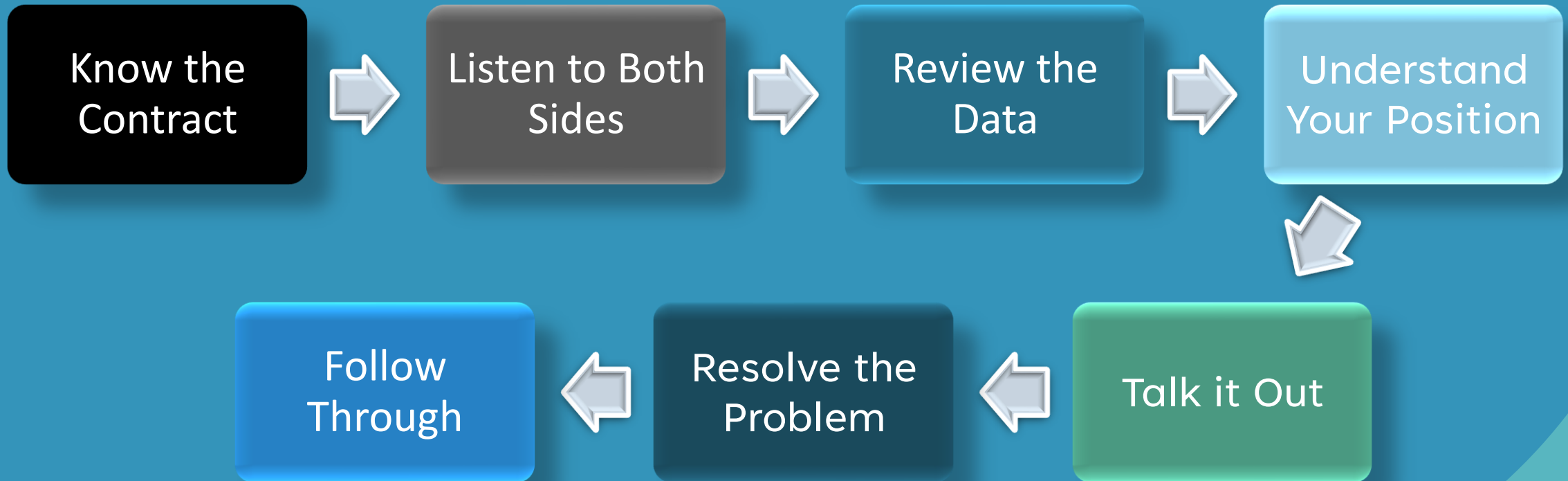
Issue Resolution

You're a contract manager and have just been notified by your end users that your contractor isn't performing, and you need to take action.

Where do you start?



Know the Contract



Resolving Problems

Issue Resolution

- Informal Remedy
- Formal Remedy
- Termination / Cancellation

Informal Remedy

Handled with phone call or email
to contact - Ask for:

- Resolution
- Confirm in writing
- Document
- Add to contract file

TIP: Amend Contract
to address new
requirements
resulting from
corrective action

Create an issue log



What should be in an issue log?

Issue Log

- Description of the issue
- Date the issue occurred
- Identify who is responsible for resolving
- Establish goals
- Add results of discussions
- Set a deadline for completion
- Share log with end users to ensure accuracy

Formal Remedy

Probation is a type of formal remedy where a contractor is given a specified period to improve their performance

A **Corrective Action Plan** is designed to address specific issues or problems. It outlines the steps necessary to resolve existing problems and prevent them from recurring in the future

Termination / Cancellation)

If vendor fails to deliver on Corrective Action Plan or other remedy, you may need to consider contract termination

- Must weigh the benefits/risks of preserving the relationship when deciding on termination
- Burden of proof on State – must be supported by documentation
- Do not take unilateral actions – consult with procurement, management, and legal
- Requires XX days notice in writing as stated in contract
- Always a last resort

Cancellation for cause [PRO-411 Contract Cancellation and Termination Procedures](#)



Tools & Resources



State Procurement Manual



State Procurement Manual

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

<https://DOA.wi.gov/ProcurementManual/Pages/default.aspx#>

2024 Wisconsin Statewide Procurement Conference



RFB & RFP Checklists



RFB/RFP Checklist

Request for Bid (RFB) Check List - RFB # _____			
Description	Estimated Business Days	Targeted Completion Date	Date Completed
1. Identify Standards Committee			
Is this a New or Existing Contract? <ul style="list-style-type: none"> ▪ If Existing, who are the current Contract Users? ▪ If New, who requested this contract? 	0 days	7/1/2023	
Ask Section Chiefs to announce the search for Development/Standards committee	0 - 3 days	7/5/2023	
2. Develop RFB and Supporting Docs			
Purpose and Scope	3 - 5 days	7/12/2023	
Bidder Qualifications	3 - 5 days	7/19/2023	
Mandatory Contract requirements	3 - 5 days	7/26/2023	
Any Special Terms and Conditions	3 - 5 days	8/2/2023	
Cost Sheet and other supporting documents	3 - 5 days	8/9/2023	
Compile list of Potential Bidders	0 - 3 days	8/14/2023	
Conduct Bidder Outreach	0 - 5 days	8/21/2023	
RFB Document and Supporting Docs Finalized	0 days	8/21/2023	
Peer Review	3 - 5 days	8/28/2023	
RFB and Supporting Documents entered into Strategic Sourcing	1-3 days	8/31/2023	
Section Chief Review <ul style="list-style-type: none"> ▪ Additional Questions and Concerns Reviewed (as needed) 	10 days	9/14/2023	
Supervisor approval to post to eSupplier	0 - 5 days	9/28/2023	



Business Case Exceptions



Business Case Exceptions (BCE)

- A Business Case Exception is NOT A WAIVER
- Approval to purchase outside of a mandatory contract
- Intended for situations when something covered under the contracts is unavailable or doesn't meet the Agency's needs
- Cost savings is typically not a good case for a BCE

Guide to Submitting Business Case Exceptions eLearning
Coming Soon!



VendorNet



VendorNet

VendorNet

Registration

Bids

Contracts

NIGP Codes

Forms

General Procurement

FAQ

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Welcome to VendorNet

Non-Discrimination in State Contracts Per 2019 Wisconsin Executive Order 1

Per 2019 Wisconsin Executive Order 1, state agencies and campuses have new requirements related to non-discrimination in state contracting.

The Department of Administration has adjusted standard terms and conditions to reflect these changes, and has published policy which provides direction on the procedures agencies will follow to ensure compliance.

Procurement Information Memorandum (PIM) 19-003: Non-Discrimination in State Contracts Per 2019 Wisconsin Executive Order 1 has been posted to the Index of PIMs found in the [Procurement Manual](#). New versions of forms DOA-3054 (Standard Terms and Conditions (RFB/RFP)), DOA-3054A (Standard Terms and Conditions (Purchase Order)) and DOA-3832 (Bidder Required Form) have also been posted to the VendorNet Forms page.

Any questions on this new requirement can be directed to doawispro@wisconsin.gov.



VendorNet

VendorNet Registration Bids Contracts NIGP Codes **Forms** General Procurement FAQ Contact Us Login

Department of Administration Forms
Numerical Listing. Download and use as appropriate.
[Topical Listing](#)

Numeric Documents

- [DOA-3001](#) Contractor Directory Recommendation (07/13)
- [DOA-3005 - Online](#) MBE Monthly Procurement Activity Report (11/10)
- [DOA-3006](#) Graphic Reproduction Equip Notification of Purchase/Lease
- [DOA-3016](#) Vehicle Request (08/19)
- [DOA-3021P](#) Contract Compliance Program Contractor Instructions (04/13) (PDF)
- [DOA-3022](#) Workforce Analysis - Contractor (03/13)
- [DOA-3023](#) Contractor's Subcontractor List (03/13)
- [DOA-3024](#) Request for Exemption from Submitting Affirmative Action Plan (03/13)
- [DOA-3027](#) Designation of Confidential and Proprietary Information (07/14)
- [DOA-3031P](#) Contract Compliance Law Poster (03/13)
- [DOA-3031P](#) Contract Compliance Law Poster (Spanish) (03/13)
- [DOA-3044](#) Collective Purchasing (08/19)
- [DOA-3046](#) Request for Purchasing Authority (RPA) (07/23)
- [DOA-3047](#) Piggybacking Data Plan (10/14) (Non-PeopleSoft agencies and UW entities)
- [DOA-3048](#) Checklist for a Request for Exemption of a Grant or a Payment Made Pursuant to Statute (10/22)
- [DOA-3049](#) Contract (05/18)
- [DOA-3051](#) Contract Amendment (04/19)



VendorNet

VendorNet Registration Bids **Contracts** NIGP Codes Forms General Procurement FAQ Contact Us Login

Search Contracts

Keyword or Number: propane

Agency:

NIGP:

Supplier:

Piggyback Yes No Both

Cooperative Purchase Yes No Both

Mandatory Purchase Yes No Both

PCard Yes No Both

*Hit Enter to Search

Contract Number	Title	Agency	Start Date
505CAP-M25-AD251066-01	Propane Air System Start Up Testing & Preventative Maintenance Inspection Service	ADMINISTRATION, DEPT OF	7/31/2024
505ENT-M25-PROPANESVC-00	Propane/LP Gas - Statewide	ADMINISTRATION, DEPT OF	7/1/2024
505ENT-M20-PRTEST&MAIWI-00	Propane Air System Start Up Testing & Preventative Maintenance Inspection Service	ADMINISTRATION, DEPT OF	8/1/2019
505ENT-M20-PROPANESVC-00	Propane/LP Gas - Statewide	ADMINISTRATION, DEPT OF	7/1/2019

Page size: 25 4 items in 1 pages



VendorNet

VendorNet Registration Bids Contracts NIGP Codes Forms General Procurement FAQ Contact Us Login

View Contract [Back to Contracts](#)

Title: Propane/LP Gas - Statewide

Agency: ADMINISTRATION, DEPT OF

Contract Number: 505ENT-M25-PROPANESVC-00

Start Date: 7/1/2024

End Date: 6/30/2026

Cooperative Purchase? Yes

Mandatory Purchase? Yes

PCard? Yes

Piggyback? Yes

Manager: [Chris Tucker](#), Phone: 608-266-5047

Procurement Authority: RFB 28418-CT

Contract Applicable To: Statewide

Synopsis: This contract is for the purchase of **Propane and LP** by the gallon delivered to storage tanks located throughout the state. The contract(s) that result from this RFB may be utilized by Authorized Users at the State, County, or Local levels of Government. User delivery locations are located throughout the State of Wisconsin.

[Weekly Oil Pricing](#) file) - NOTE - File is updated weekly.

Additional Contract Numbers:

- 505ENT-M25-PROPANESVC-01 Allied Cooperative
- 505ENT-M25-PROPANESVC-02 Consolidated Energy
- 505ENT-M25-PROPANESVC-03 Ferrellgas LP
- 505ENT-M25-PROPANESVC-04 Insight FS
- 505ENT-M25-PROPANESVC-05 MILTON PROPANE
- 505ENT-M25-PROPANESVC-06 Thaler Oil Co., Inc.
- 505ENT-M25-PROPANESVC-07 Weber Oil Company
- 505ENT-M25-PROPANESVC-08 WK Appliances, Inc.



VendorNet

Documents:

- 01 User Guide - Propane.docx 6/28/2024
- 02 Price List FY 25.xlsx 9/6/2024
- 03 Quarterly Report Template 2024.xlsx 6/28/2024
- 04 RFB Propane_LP Gas Statewide.pdf 6/28/2024
- 05 Adding, Deleting or Correcting Propane Locations 8.9.21.xlsx 6/28/2024
- 06 Ferrellgas_WI_Contact_List.doc 6/28/2024

NIGP Codes

Code	Description
40503	Butane and Propane (Including Liquefied Petroleum Gas)



Using Chat...



Questions



Questions

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Thank you!

