

Exploring Collaborative Contracting

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November 14, 2024



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AGENDA

- 3 Musketeers
- What is Collective Purchasing?
- RPA Requirements
- What is Piggybacking?
- What is Cooperative Purchasing?
- Resources



Using Chat or Unmute Your Mic...

A group of people, mostly seen from the chest down, are holding a large white rectangular sign. The sign has bold black text centered on it. The people are wearing various casual clothing like jackets and sweaters. The background is slightly blurred, suggesting an indoor setting.

**What are the
different types of
Collaborative
Contracting?**

The 3 Musketeers

- Collective Purchasing
- Piggybacking
- Cooperative Purchasing

Collaborative Contracting - Visual Guide



What is Collective Purchasing?



When is Collective Purchasing Most Beneficial?



- ✓ 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 States'
Contracts

Wisconsin
Municipalities

Nonprofit
Consortium
Contracts



*“Nature provides
exceptions to every rule.”*

Margaret Fuller



Limitations and Prohibited



Federal Government
Limited



Non-Profit Organizations
Limited



Other States' Municipalities
Prohibited

Collective Purchasing Examples

- NASPO: AED, Fire & Security, Small Packages
- SpeedDee (State of MN)
- MMCAP (State of MN)

VendorNet.wi.gov



Photo credit: Logistics Magazine

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 & How Can It Save Time and Resources?



“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



STAR Piggybacking Request

Instructions: Send the completed form via e-mail to: doadlprocplan@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?



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



Collaboration Leads to Success!


**USING CHAT:
DO YOU USE ANY
COLLABORATIVE OR
COLLECTIVE
CONTRACTS?**



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)
S. 16.72 WIS. STATS



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:
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Address:

City:	State:	Zip:
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Mailing Address for Purchase Orders (if different than above)

Address:

City:	State:	Zip:
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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
- Practical Guide to Collaborative Contracting in the State of
- Wisconsin eLearning



*Attached as a resource on [Conference website](#)

Questions



Thank you!

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