# Exploring Collaborative Contracting

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# Presenters

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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...

What are the different types of Collaborative Contracting?

# The 3 Musketeers

- Collective Purchasing

- Piggybacking

- Cooperative Purchasing

<u>Collaborative Contracting - Visual Guide</u>

# What is Collective Purchasing?

- Another State
- Federal Government
- Wisconsin Municipality
- Regional or National Consortium

# 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

- SpeeDee (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 |
|---|---|---|---|---|---|---|
| | Completed and signed form DOA-3046, Request for Purchasing Authority (RPA) *PRO-210* | X | X | X | X | X |
| | Completed form DOA-3044, Collective Purchasing *PRO-502* | | | X | | |
| | Completed form DOA-3821A, Justification of Need and Cost Benefit Analysis Project Summary (as applicable for contractual services only) *PRO-205* | X | X | X | | X |
| | Copy of public/legal notice; for sole source waiver, public notice must contain the name of the proposed sole source supplier *PRO-210* | | X | | | X |
| | Copy of RPA to be amended *PRO-210* | X | | | | |
| | Vehicle Request form DOA-3016 *PRO-506* | | | | X | |
| | Proposed Contract *PRO-511* | | | | | 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

# 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

# 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.Busserv.wisc.edu/Puct/Main_menu.aspx)
  - [https://www.Wisconsin.edu/Procurement/Contracts/](https://www.Wisconsin.edu/Procurement/Contracts/)
- VendorNet for State Agencies and STAR under transactional contracts
  - [https://VendorNet.wi.gov/Contracts.aspx](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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