

2024 Wisconsin State Procurement Conference

The State of State Procurement

November 13, 2024



Agenda

- Welcome
- Session Review
- Supplier Diversity Program Updates
- SBOP Operational Updates
- Looking Ahead



Day One: Session Overview

Opening Session

- You are here!

Breakout Session One (1:45 – 2:45)

- IT Best Practices
- Building a Strong Case: Waivers
- STAR Strategic Sourcing

Breakout Session Two (3:00 – 4:00)

- Get to Know the IT Team
- Get to Know the Enterprise Sourcing Team
- What Can CAPS Do For You?

Day Two: Session Overview

Breakout Session One (8:30 – 9:30)

- IT Cloud: Basics
- Shortlisting in a RFP
- Contracts are Like a Box of Chocolates

Breakout Session Two (9:45 – 10:45)

- IT Cloud: Advanced
- Agency Panel Discussion
- Exploring Collaborate Contracting

Breakout Session Three (11:00 – 12:00)

- WisPro: How Can We Help You?
- Using Pre-Sourcing Methods to Your Advantage
- STAR Strategic Sourcing (repeat)



Alex Ysquierdo, MSc. – Director



What We Do...



- Empowering Diverse Businesses to Thrive and Succeed in Wisconsin: Certification Opens Doors to State Opportunities!
- Wisconsin has Purchasing Goals of 5% with MBEs and 1% with DVBs

MBE – Minority-Owned Business Enterprise

WBE – Women-Owned Business Enterprise

DVB – Service-Disabled Veteran-Owned Business

What We've Been Up To...

- We made our customer service about the ICE
- Cleaned up processes and workflows to make thing
- We refreshed our website
- Created better guides and FAQs
- Increased awareness around our procurement opportunities
- Created strategic partnerships over 30 statewide
- Our activities, behaviors, and values all support our mission.



How did WI do in FY23?

Diverse suppliers accounted for \$205,387,642 of the \$3,366,750,876 State Agency and University of Wisconsin System spending in general procurement, facilities construction, architecture/engineering, and state highway services during FY23. Diverse supplier purchases represented 6.10% of total spending.



5%-20% Diverse Spend Agencies

Secretary of State	19.57%
Child Abuse and Neglect Prevention Board	19.47%
Workforce Development, Department of	16.60%
Children and Families, Department of	14.76%
Lower Wisconsin State Riverway Board	14.70%
Wisconsin Technical College System Board	13.76%
Employee Trust Funds, Department of	13.22%
Administration, Department of	11.75%
Elections Commission	10.93%
Justice, Department of	10.91%
Public Defender Board	10.40%
Insurance, Commissioner of	9.47%
Transportation, Department of	8.85%
Wisconsin Housing and Economic Development Authority	8.82%
Legislative Technology Services Bureau	7.21%
Health Services, Department of	7.11%
Public Service Commission	6.06%
Natural Resources, Department of	5.67%
Public Instruction, Department of	5.55%



>25% Diverse Spend



Financial Institutions, Department of	36.46%
Safety and Professional Services, Department of	29.74%
Supreme Court	29.48%
Aging and Long-Term Care, Board on	25.27%
Agriculture, Trade and Consumer Protection, Department of	21.95%



Supplier Diversity's Goal for Success



Continue building the brand

Modernize the processes

Stay committed to the “ICE”

Build Awareness

Disrupt the norm



Contact Information

Libby Schmiedlin | Equal Opportunity Specialist

Libbyp.Schmiedlin@wisconsin.gov

Phone: (608) 267-0297

Khadijah Perry | Equal Opportunity Specialist

Khadijah.Perry@wisconsin.gov

Phone: (608) 264-7893

Alex Ysquierdo, MSc | Director

Alex.Ysquierdo@wisconsin.gov

Phone: (608) 267-7806



Thank You!



SBOP Operational Updates



Staffing

IT Sourcing

- Deb Adamski-Pavlaski
- Sandra Barg
- Russell Bowe
- Hallee Kox
- Suzanne Meyer

Enterprise Sourcing

- Ron Hooker
- Anna Lange

CAPS

- Brooke Gullick
- Josh Junig

In other news...

Kathy Bergh became the new Enterprise Sourcing Section Chief

Amber Rademacher was promoted to CAPS Section Chief



Training

- We've developed and posted to Cornerstone 17 new training modules since the last conference
- A complete list of trainings is available on the [SBOP Trainings & eLearnings](#) page of the DOA Internet



Sample of New Trainings

Practical Guidance

- Collaborative Contracting
- Waivers
- Public Notices

RFP Specific

- How to Conduct BAFOs
- Evaluation Committee Kick-Off Meetings
- Participating on an Evaluation Committee

IT Best Practices Series

- IT Purchases Overview
- Navigating Hardware Purchases
- Navigating Software Purchases
- Hardware Contract Language
- Software Contract Language
- Cloud Software Contracts
- Cloud Brokerage
- Large, High-Risk IT Contracts

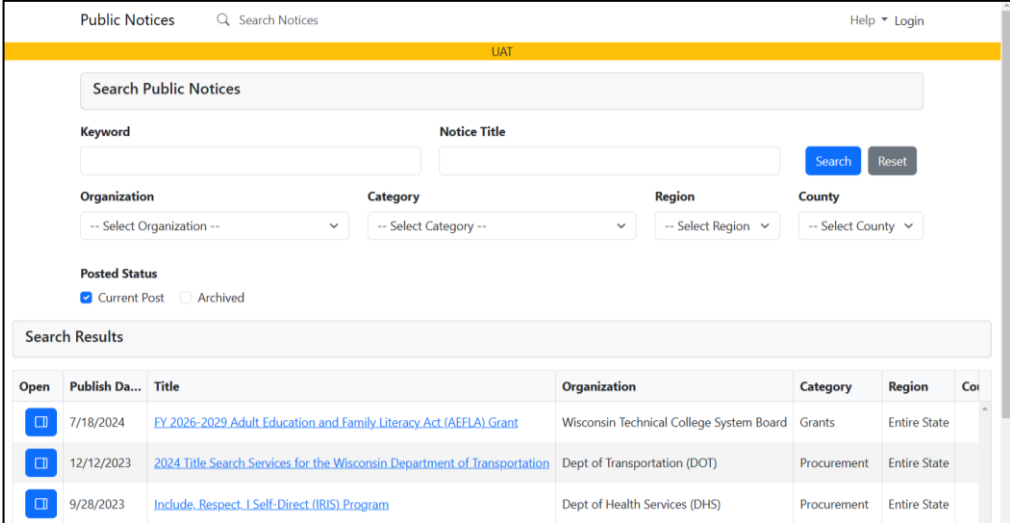


Looking Ahead



System Updates: Public Notice

- Modernizing the website
- Currently in development and nearing completion!
- Updated site to launch very early 2025
- Integrated with MyWisconsin ID (one login for all state accounts across sites)
- Adding Agency Admin role (allowing agencies/campuses to directly approve users)



The screenshot displays the 'Public Notices' web application interface. At the top, there is a navigation bar with 'Public Notices', a search icon, 'Search Notices', and user options 'Help' and 'Login'. Below this is a yellow banner with 'UAT'. The main content area features a search bar labeled 'Search Public Notices'. Below the search bar are two input fields: 'Keyword' and 'Notice Title', with 'Search' and 'Reset' buttons. There are four dropdown menus for filtering: 'Organization' (with '-- Select Organization --'), 'Category' (with '-- Select Category --'), 'Region' (with '-- Select Region --'), and 'County' (with '-- Select County --'). Below these is a 'Posted Status' section with radio buttons for 'Current Post' (selected) and 'Archived'. The 'Search Results' section contains a table with the following data:

Open	Publish Da...	Title	Organization	Category	Region	Co
	7/18/2024	FY 2026-2029 Adult Education and Family Literacy Act (AEFLA) Grant	Wisconsin Technical College System Board	Grants	Entire State	
	12/12/2023	2024 Title Search Services for the Wisconsin Department of Transportation	Dept of Transportation (DOT)	Procurement	Entire State	
	9/28/2023	Include, Respect, I Self-Direct (IRIS) Program	Dept of Health Services (DHS)	Procurement	Entire State	



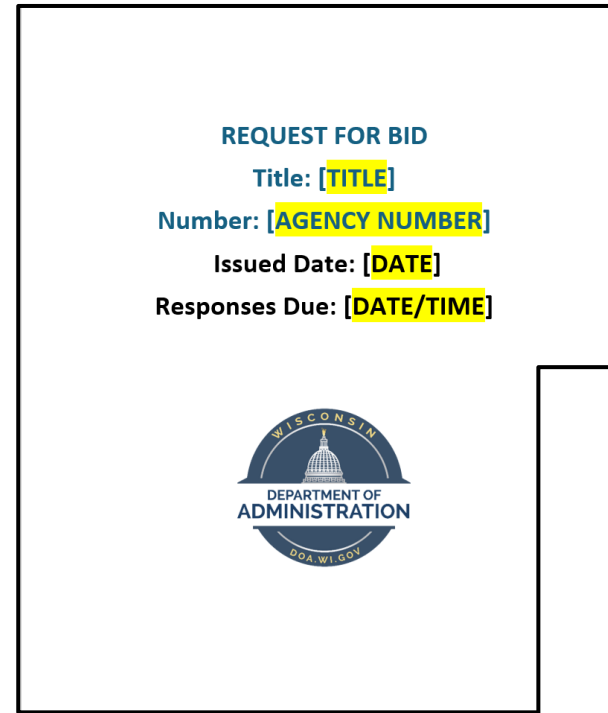
System Updates: VendorNet

- Plan to upgrade VendorNet in 2025
- Integrated with MyWisconsin ID (one login for all state accounts across sites)
- Improved Search functionality
- Faster load times for pages and searches
- More user-friendly and intuitive to use
- Improved functionality
 - Allow agencies/campuses to have Admin control over their users
 - Freedom to update contract/bid procurement contacts
 - Ability to approve agency/campus user accounts



RFB Template

- New Templates!
 - RFB
 - User Guide
- We are close to finalizing
- Goal is to publish on VendorNet early 2025



Training

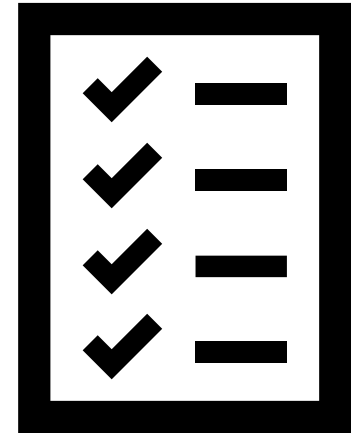
- Some topics we're currently working on:
 - Requesting Grant Exemptions
 - Submitting Business Case Exceptions
- Others we're exploring:
 - Sustainable Purchasing
 - Introduction to Ethical Procurement



We are always interested in hearing about possible training topics. Please contact Anne Gerke at Anne.Gerke@wisconsin.gov with your ideas!

Management Reviews

- We revised the process by:
 - Transitioning the review from in-person to virtual
 - Taking advantage of information available in STAR
 - Updating documentation
- We successfully completed our first virtual management review and will continue with reviews in the next year



Security Rider

STATE OF WISCONSIN SECURITY RIDER

The terms and conditions of the State of Wisconsin Security Rider (hereinafter "Rider") shall apply to all Products or Services provided under the Master Contract, unless otherwise agreed to by the parties. This Rider shall apply to all environments (e.g., cloud-SaaS, IaaS, PaaS, AI, on-premises, and hybrid); all computing elements performed, provided, occupied, or utilized; and all access to State resources related to the delivery of Products or Services under the Master Contract.

In the event of a conflict between the terms of this Rider, the Master Contract or any other SLAs or contracts between the State and Contractor, this Rider shall control.

1 Definitions

1.1 "Agency" or "State Agency" means an office, department, agency, institution of higher education, association, society, or other body in State of Wisconsin government created or authorized to be created by the State Constitution or any law, which is entitled to expend moneys appropriated by law, including the legislature and the courts, but not including an authority, as defined in Wis. Stat. § 16.70(2).

1.2 "Artificial Intelligence" or "AI" refers to the development of computer systems capable of performing tasks that historically required human intelligence, such as recognizing speech, making decisions, and identifying patterns. AI encompasses a wide variety of technologies, including machine learning, deep learning, and natural language processing (NLP).

1.3 "Confidential Data" means any type of data that presents a high or moderate degree of risk if released, disclosed, modified, or deleted without authorization. There is a high degree of risk when unauthorized release or disclosure is contrary to a legally mandated confidentiality requirement. There may be a moderate risk and potentially a high risk when an agency has discretion under the law to release data, particularly when the release must be made only according to agency policy or procedure. Confidential Data includes, but is not limited to:

- a) Personally Identifiable Information;
- b) Individually Identifiable Health Information;
- c) Federal Tax Information (FTI) under IRS Publication 1075 and bank or other financial account numbers;
- d) Criminal Justice Information (CJI) under the Federal Bureau of Investigation's Criminal Justice Information Services (CJIS) Security Policy and the Law Enforcement Automated Data System (LEADS) Policy, substance use disorder records under 42 C.F.R. Part 2, and crime victim information;
- e) Other types of information not associated with an individual such as state building specifications, security and infrastructure records, and trade secrets; and
- f) Information covered by the Children's Online Privacy Act (COPPA) and Federal Educational Rights and Privacy Act (FERPA), and other information concerning minors, such as child critical incident records and other juvenile records.

| Security Rider v8

- Staff in SBOP, DET, and Legal worked together to create an updated security rider for IT contracts
- SBOP intends to include this document with all solicitations and will work with the DET CISO when negotiating terms with vendors
- Final document will be available to agencies as a resource for inclusion in agency-specific solicitations



Thank you!

