



State Procurement Manual

Department of Administration, State Bureau of Procurement

Number
PRO-105

Section	Effective	Replaces
INTRODUCTION AND PROCUREMENT FUNDAMENTALS	2/18/2020	PRO-D-23, G-4 (Various Dates)
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PROCUREMENT RECORD RETENTION AND ACCESS	1 of 3	

SCOPE: The purpose of this policy is to establish recordkeeping and retention standards for various procurement events, and to prescribe official procedure for making such records publicly available.

POLICY: The state maintains an open and public process in the solicitation, submission, review, and award of procurement contracts. All persons are entitled to information regarding state procurement activities.

Competitive bidding, competitive negotiation (RFP), and noncompetitive negotiation require documentation of the procurement process and the results of the action taken.

Records of “the procurement process and the action taken” include the final version of records listed in the forms referenced herein. Personal notes for one’s personal use and preliminary drafts prepared by an originator or in the name of a person or entity for whom the originator is working are not considered part of an official procurement file.

- PROCEDURE:**
- I. Required Elements of Procurement Files
 - A. Agencies will ensure a complete procurement file is constructed based on the type of event being conducted as provided for on DOA-3840: Procurement Recordkeeping Checklist.
 - B. Approved Requests for Procurement Authority are filed in accordance with DOA-3046: Request for Procurement Authority.
 - C. Approved exemption requests for grants or payments made pursuant to statute are filed in accordance with DOA-3048: Checklist for a Request for Exemption of a Grant or a Payment Made Pursuant to Statute.



Legal Authority

Wis. Stats. 16.75(1)(a); 19.31; 19.32; 19.33; 19.34;
 19.35; 19.36; 19.37; 19.39; 19.85(1)(e); 134.90(1)(c)
 943.205(2)(e)
 Wis. Adm. Code Chapter Adm 8.04
 Agencies Affected: All, unless otherwise noted

Authorized:
 Sara Redford, Director
 State Bureau of Procurement



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II. Required Retention of Records

- A. Agencies will follow the Statewide Purchasing and Procurement General Records Schedule as established by the State of Wisconsin Public Records Board.

III. Public Availability of Records

- A. At the agency's discretion, bidders' lists may be kept closed until the timelines identified in III, B and C below. However, in some instances, the agency may choose to provide the bidders/proposers list before such dates to increase competition or encourage vendor partnerships.
- B. The public may inspect Request for Bid (RFB) records and may copy them after the notice of intent to award is issued or, in the case of RFBs for commodities and for RFBs at or below the official bidding threshold, after the contract is awarded. See PRO-304, Bidding Policy and Procedure, Official Sealed Bid.
- C. All Request for Proposal (RFP) (i.e. competitive negotiation) records are available for public inspection after the notice of intent to award is issued or, in the case of RFPs for commodities and for RFPs at or below the official bidding threshold, after the contract is awarded except as noted in III, D or E. below. See PRO-306, Competitive Negotiation (Request for Proposals).
- D. Any record or portion of a record that contains confidential information, or a trade secret, or wage information on printing procurements may be withheld. Such information must be identified as confidential or a



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trade secret by the bidder at the time the bid is submitted. Applicable definitions are contained in PRO-101, Definitions and Thresholds.

- E. Records distributed or generated at a public bid or proposal (where applicable) opening may be available earlier than the timelines set forth in III, B and C above.
- F. Each agency will make available for inspection and copying any record produced or collected by a vendor under a contract to the same extent as if the record were maintained by the agency.
- G. Questions concerning public records disclosure obligations should be directed to the agency's public records legal counsel.

REFERENCE: DOA-3840: Recordkeeping Checklist
 DOA-3046: Request for Procurement Authority
 DOA-3048: Checklist for a Request for Exemption of a Grant or a Payment Made Pursuant to Statute



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