



State Procurement Manual

Department of Administration, State Bureau of Procurement

Number
PRO-201

| | | |
|-----------------------------------|------------------|-----------------------|
| Section | Effective | Replaces |
| PLANNING AND PROCUREMENT STRATEGY | 9/16/19 | PRO-A-4 (10-31-11) |
| Title | | Page |
| PROCUREMENT PLANS | | 1 of 2 |

SCOPE: The scope of this policy is to establish requirements and procedure for submitting procurement plans and to simplify the approval process to obtain authority to conduct certain transactions as listed in this policy.

POLICY: Agencies will complete a procurement plan for the processes outlined below and based on defined thresholds. See PRO-101, Procurement Definitions and Thresholds.

- Requests for proposals (RFP) in all amounts; see PRO-306.
- Collaborative Contracting methods except piggybacking; see PRO-502.
- Requests for bids (RFB) for services, or RFBs for commodities where there is an estimated service component valued over the official sealed bidding threshold; see PRO-304.
- Transactions over the official bidding threshold where more than one agency is participating in the procurement

The following purchases do not require a procurement plan:

- Transactions below the official bidding threshold
- Request for Procurement Authority (RPA); see PRO-210.
- RFB for commodities
- Piggybacking from other agency contracts; see PRO-502.
- Purchases using statewide contracts

Printing is bid (RFPs are not allowed) in accordance with an agency’s level of delegation and applicable policy; see PRO-505, Printing Procurement Policy and Procedure. Agency delegation to conduct other procurement processes is established in PRO-102, Delegation.

PROCEDURE:

- I. Submittal and Review
 - A. Agencies with delegation, and those not otherwise supported by Consolidated Agency Purchasing Services (CAPS), will complete a procurement plan using form DOA-3720 for each



Legal Authority

Wis. Stats. ss. 16.71; 16.72(4); 16.75(1)(c)

Agencies Affected: All, unless otherwise noted

Authorized:

Sara Redford, Director
State Bureau of Procurement



State Procurement Manual

Department of Administration, State Bureau of Procurement

Number
PRO-201

| Section | Effective | Replaces |
|-----------------------------------|-----------|-----------------------|
| PLANNING AND PROCUREMENT STRATEGY | 9/16/19 | PRO-A-4 (10-31-11) |
| Title | | Page |
| PROCUREMENT PLANS | | 2 of 2 |

anticipated procurement and submit to the Bureau as instructed.

- B. The Bureau will review plans and provide a written determination. With confirmation, the agency is permitted to proceed with the procurement outlined in its plan, unless otherwise stipulated. The agency will retain a copy of the plan in its procurement file, along with the Bureau's response.
- C. CAPS agencies will work through CAPS staff, who will follow steps A-B.

REFERENCE: DOA-3720: Procurement Plan



Legal Authority

Wis. Stats. ss. 16.71; 16.72(4); 16.75(1)(c)

Agencies Affected: All, unless otherwise noted

Authorized:

Sara Redford, Director

State Bureau of Procurement