



State Procurement Manual

Department of Administration, State Bureau of Procurement

Number
PRO-512

Section EXCEPTIONS, WAIVERS AND SPECIAL HANDLING	Effective 9/16/19	Replaces PRO-I-6; I-7 Various Dates
Title SERVICES REQUIRING SPECIAL APPROVAL AUTHORITY: BANKING AND PRIVATE SECURITY SERVICES		Page 1 of 2

SCOPE: The purpose of this policy is to establish approval requirements and official procedure related to procurement of banking or private security services.

POLICY: Certain categories of services need to be approved by proper/expert authorities prior to an agency making a purchase, regardless of dollar amount.

Private Security Guard Services

Prior to taking any procurement, purchasing or contractual action for private security guard services, the agency first will contact the Department of Administration, Wisconsin State Capitol Police, room B2 North State Capitol, telephone (608) 266-7840.

Banking and Related Services

Under section 34.045, Wisconsin Statutes, the Depository Selection Board establishes procedures for the contracting of banking services.

When a state agency determines that it needs to 1) utilize an existing state contract to establish banking services (e.g., new bank accounts or lockboxes); or 2) procure a new banking service, it will follow the procedures outlined herein and applicable requirements of the State Accounting Manual.

- PROCEDURE:**
- I. Approval of Private Security Services
 - A. The Capitol Police will furnish the agency with a Security Program Study Report (form DOA-8467), which is to be completed according to instructions and forwarded to Capitol Police for approval.
 - B. When a procurement plan is required, the agency will include a copy of the approved form at the time it is sent to the State



Legal Authority

Wis. Stats. 15.105(3); 16.71; 20.905(1); 20.920(2)(c);
34.045
Agencies Affected: All, unless otherwise noted

Authorized:
Sara Redford, Director
State Bureau of Procurement



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Bureau of Procurement (Bureau) for approval. See PRO-201, Procurement Plans.

- C. The agency will complete the form initially and with every subsequent solicitation. The agency need not complete the form for contract extensions unless the original request did not include renewal options.

II. Approval of Banking Services

- A. An agency is required to e-mail form DOA-2571, Uniform Request for Banking Services, to the Treasury Services supervisor within the State Controller’s Office.
- B. Requests to use an existing state contract to establish banking services will be approved directly by the State Controller’s Office. Requests for new banking services, which may require a new procurement, will result in the State Controller’s Office consulting with the Bureau. In addition, any resulting procurement may need the approval of the Depository Selection Board before the request for bid/proposal is released.
- C. Proposed procurements that are primarily for non-banking services but include ancillary banking services (e.g., a fiscal agent contract that includes a subcontracted bank to provide checking and deposit services) must also be communicated to the Bureau and State Controller’s Office for consult.

III. Recordkeeping

The agency will retain in its files a copy of this approved form(s) and related approval correspondence with the official procurement file.



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