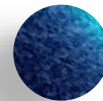


Q&A with SBOP Staff

General Procurement Topics



Panel Members

- **Jessica Potter**
Section Chief, WisPro Resources & Special Programs, SBOP
- **Cathy Neidner**
Section Chief, Consolidated Agency Purchasing Services (CAPS), SBOP
- **Anne Gerke**
Senior Procurement Training Specialist, WisPro, SBOP
- **Ann Hommer**
IS Technical Services Senior, WisPro, SBOP
- **Nadine Malm**
Contract Specialist Advanced, WisPro, SBOP
- **Terri Lenz**
Procurement Specialist Senior, SBOP

Poll:

What does the acronym
“SBOP” stand for?

- a) State Board of Purchasing
- b) State Bureau of Procuring
- c) State Bureau of Procurement
- d) State Board of Procurers

VendorNet

<https://VendorNet.wi.gov>

Expert: Jessica Potter, WisPro

Poll:

How do you typically use VendorNet?

- a) To post solicitations or contracts
- b) To search contracts
- c) To access procurement forms
- d) To access other procurement information
- e) I do it all!
- f) I don't use VendorNet

VendorNet

- <https://VendorNet.wi.gov>
- Access procurement information
- Download required forms
- Search bids & contracts
- Post bids (campuses & municipalities)
- Post contracts (agencies & campuses)

The screenshot shows the VendorNet website interface. At the top, there is a navigation menu with links: VendorNet, Registration, Bids, Contracts, NIGP Codes, Forms, General Procurement, FAQ, Contact Us, and Login. Below the navigation is a 'Search Contracts' section with input fields for 'Keyword or Number', 'Agency', 'NIGP', and 'Supplier'. There are also radio button options for 'Cooperative Purchase' (Yes, No, Both), 'Mandatory Purchase' (Yes, No, Both), and 'PCard' (Yes, No, Both). Below the search fields, a message states: '*Hit Enter to Search' and 'This site does not contain UW Madison Contracts. Please navigate to [UW Contracts](#)'. At the bottom, there is a table of contracts with columns for Contract Number, Title, Agency, and Start Date.

Contract Number	Title	Agency	Start Date
505ENT-M22-NATURAL GAS WI-00	Natural gas Gas Supply & Management Non - Firm	ADMINISTRATION, DEPT OF	1/1/2022
ETI0047	ETI0047 Third Party Administration of the Wisconsin Public Employers Group Life Insurance Program	EMPLOYEE TRUST FUNDS	1/1/2022
KK22-05-O	Automobile Parts (OEM and aftermarket)	UW MILWAUKEE	11/1/2021
410039-M22-RLH8252-RFB-01	Transcription Services	CORRECTIONS, DEPT OF	11/1/2021
UN-B-0003	Exterior Pan Signage for UW Whitewater	UW WHITEWATER	11/1/2021
C22-012-O	Snow Removal Services at UWM UPark Off Campus Parking Lot	UW MILWAUKEE	10/15/2021



WISBuy Marketplace

<https://WISBuy.wi.gov>

Expert: Ann Hommer, WisPro

Poll:

How familiar are you with WISBuy?

- a) I'm the WISBuy Admin for my agency/campus
- b) I use it all the time!
- c) I know of it, but I don't use it often
- d) I've heard of it, but I'm not too sure what it is
- e) I have no idea what you're talking about

WISBuy Marketplace

- <https://WISBuy.wi.gov>
- Order products from multiple statewide contracts at one time
- Compare products from multiple suppliers within WISBuy



Procurement Training: Cornerstone

Expert: Anne Gerke, WisPro

SBOP Training – Cornerstone Registration

- **State Agencies**
 - Access and register via HR Self-Service PeopleSoft portal
- **UW System Campuses**
 - Access and register through the Cornerstone External Portal for Procurement
- **Municipalities & Other Users**
 - Email Anne Gerke at Anne.Gerke@wisconsin.gov to request access to procurement trainings

Poll:

How many SBOP procurement classes have you attended?

- a) None
- b) 1-2
- c) 3-4
- d) 5-6
- e) So many I've lost count!



Poll:

Which type of training is your favorite?

- a) eLearnings
- b) Instructor-led virtual trainings
- c) In-person classes at DOA
- d) I like them all!

Poll:

When searching in Cornerstone, which term(s) will show me SBOP's procurement trainings?

- a) Search for "procurement"
- b) Search for "DOA"
- c) Search for "SBOP"
- d) All of the above



DocuSign eSignature

<https://Account.DocuSign.com>

Expert: Jessica Potter, WisPro

Poll:

Do you use DocuSign?

- a) I use it all the time – I'm practically an expert!
- b) I have an account and use it occasionally
- c) I've signed things in DocuSign, but I've never sent anything
- d) I haven't used it, but I'd like to
- e) I've never heard of it

Last 6 Months



DocuSigned by:

Jessica Potter

0DE2AC19B170447...

Government Account

0

Action Required

3

Waiting for Others

0

Expiring Soon

35

Completed

Drop documents here to get started

or

START ▾

Favorite Templates

[Templates >](#)

Training Request Form

USE

DEO Performance Evaluation

USE



Poll:

True or False: All agencies and campuses have access to DocuSign.

- a) True
- b) False

Answer:

True!

All agencies and campuses pay for their portion of the DocuSign contract through their procurement assessment and based on their percentage of Ch. 16 spend, whether they use the system or not.

STAR System

<https://STARConnection.wi.gov>

Expert: Cathy Neidner, CAPS

STAR System

- Strategic Sourcing module
- Transactional contracts
- Requisitions, POs, and PCard transactions



Poll:

Do you use STAR's Strategic Sourcing Module to post solicitations?

- a) Yes
- b) No

Poll:

If you use STAR's Strategic Sourcing Module to post solicitations, what method do you use?

- a) Create everything within Strategic Sourcing
- b) Upload the main document and all attachments into the module
- c) Hybrid approach – create some elements within Strategic Sourcing and upload other pieces

Poll:

For those that use STAR's Strategic Sourcing Module, how comfortable are you using the system?

- a) I'm an expert!
- b) I can usually figure it out
- c) I can do it with some help from others
- d) I don't understand it at all
- e) I don't use Strategic Sourcing



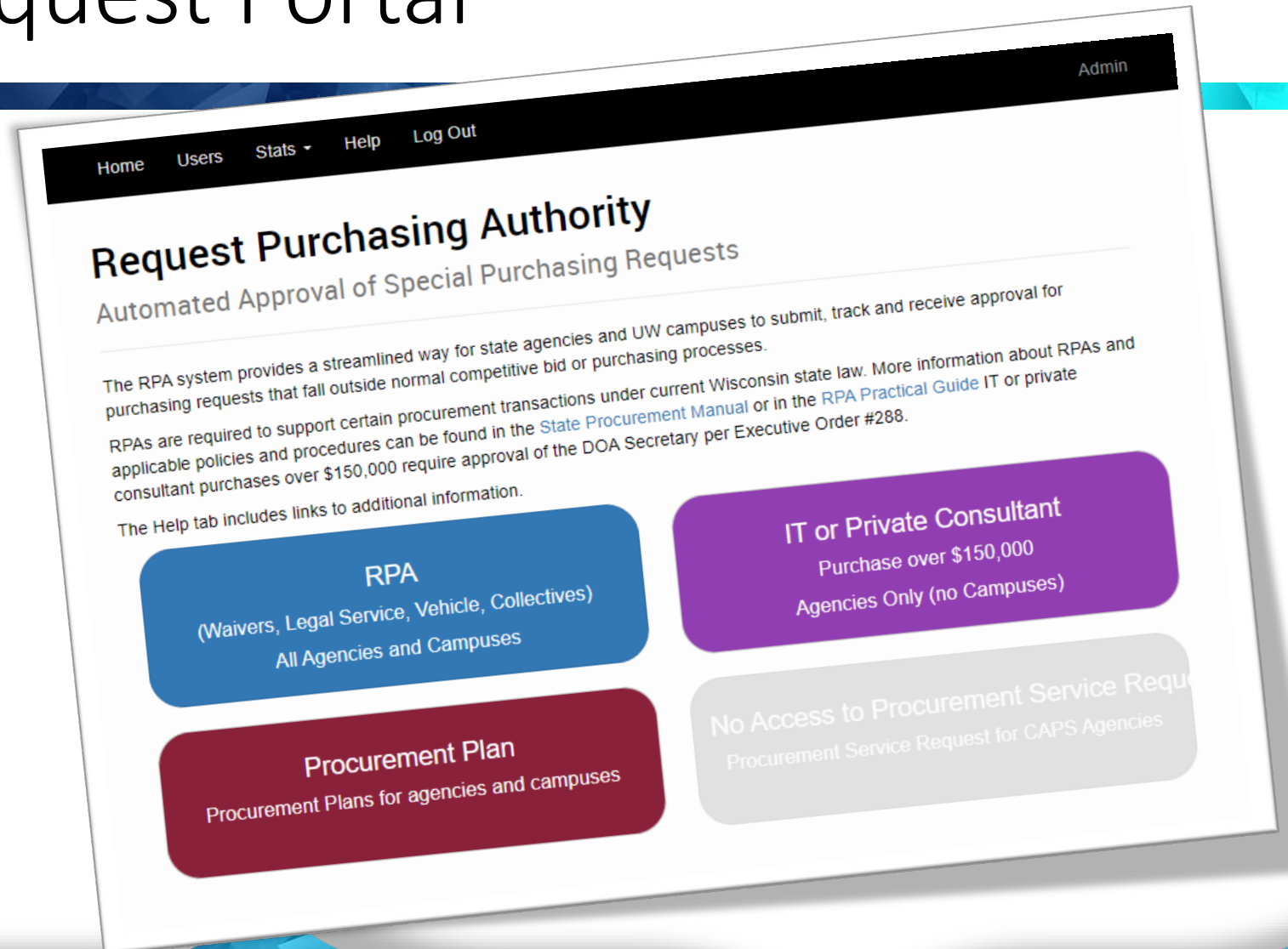
Procurement Request Portal

<https://rpa.wi.gov>

Expert: Jessica Potter, WisPro

Procurement Request Portal

- RPA Automation System
- Procurement Plan System



Poll:

Have you used the
Procurement Request Portal?

- a) I've used it for both RPAs and Proc Plans
- b) I've used it only for RPAs
- c) I don't use the Procurement Request Portal

State Use Program

<http://StateUseProgram.wi.gov>

Expert: Nadine Malm, WisPro

State Use Program

Wisconsin's State Use Program supports certified work centers that offer training and job opportunities to individuals with severe disabilities

Wisconsin's State Use Program

Print Version

Home
Work Center Products and Services List
Directory of Certified Work Centers
Program Contact Information
Meetings
About the Program
State Use Board Directory
Program Benefits
NEWS

Enter Keyword:

— Quick Links —

- FY15 State Use Program Annual Report
- FY14 State Use Program Annual Report
- FY13 State Use Program Annual Report
- FY12 State Use Program Annual Report
- FY11 State Use Program Annual Report
- FY2010 Annual Report
- FAQ's
- Program Requirements
- Video: State Use Program Overview, 19MB



Poll:

Are the State Use Program contracts awarded to work centers mandatory?

- a) Yes
- b) No
- c) Unsure



Contract Compliance & Affirmative Action

[PRO-403](#), §16.765 Wis. Stats

Expert: Nadine Malm, WisPro

Poll:

When does a contractor have to submit an Affirmative Action Plan?

- a) When registering on eSupplier to receive solicitations
- b) When submitting a response to a solicitation
- c) When awarded a contract valued at \$50,000 or more

Contract Compliance: Affirmative Action Plans

- Requires vendors with contracts valued at over \$50,000 don't discriminate in certain hiring practices
- Also requires that they file an Affirmative Action Plan with the State
- New exemptions



State & Federal Surplus Property Programs

Expert: Nadine Malm

Federal Surplus Property Program

Federal Surplus Property Program

The Federal Surplus Property Program enables eligible organizations to obtain property that the federal government no longer needs. Types of property include automobiles, trucks, boats, construction equipment, aircraft, machine tools, compressors, generators, medical equipment, electronics, food preparation items, office furniture, food, and many others. In Wisconsin, this program is administered by the Department of Administration (DOA).



Federal Surplus Property for
Public Entities & Eligible Nonprofit Organizations



Federal Surplus Property for
Veteran-Owned Small Businesses (VOSBs)

[Contact Us](#) [Legal/Acceptable Use](#)

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Poll:

When do agencies need DOA Surplus Manager approval prior to disposal of surplus property?

- a) When the original item cost or current value is less than \$5,000
- b) When the original item cost or current value is between \$5,000 and \$50,000
- c) When the original item cost or current value is more than \$50,000
- d) No approval is needed for disposal

Poll:

Do agencies need prior approval to dispose of surplus vehicles?

- a) Yes
- b) No

Poll:

Who is eligible to receive items through the Federal Surplus Property Program?

- a) Agencies
- b) Wisconsin municipalities
- c) Nonprofit organizations
- d) Veteran-owned small businesses
- e) All of the above



eSupplier Bidder Portal

<https://eSupplier.wi.gov>

Expert: Jessica Potter, WisPro

eSupplier Bidder Portal

- “Home base” for bidders
- Bidder registrations, adding NIGP codes
- Respond to solicitations from STAR agencies



eSupplier

CLINICAL LABORATORY SERVICES



The Department of Administration (DOA), Consolidated Agency Purchasing Services (CAPS), on behalf of the Wisconsin Department of Veterans Affairs (WDVA), Wisconsin Veterans Home at King (WVH-K), requests Bids for the procurement of clinical laboratory services. The WDVA intends to use the results of this process to award a Contract.

The WVH-K has a total of 520 skilled nursing beds. The WVH-K follows Federal Centers for Medicare and Medicaid (CMS) and Federal Veterans Affairs (VA) requirements.

The WVH-K previously operated an in-house clinical laboratory. The laboratory at WVH-K is no longer in operation and WVH-K must contract for these services.

SOLICITATION INFORMATION	AGENCY CONTACT INFORMATION
Event Number: 12004	Name: Stella Ness
Event Status: Posted/Awaiting Responses	Email: stella.ness2@wisconsin.gov
Solicitation Reference #: VA220927	Phone: 608/264-9591 Phone Ext.:
Agency: Department of Veterans Affairs	Fax:
Available Date: 09/30/2021	
Response Due Date: 10/28/2021 at 1:00PM	

DOCUMENT DOWNLOADS

Main Document All Documents

[Submit Online Response](#)

SUPPORTING DOCUMENTS

QUESTIONS & ANSWERS

No questions have been answered yet

[Ask a Question](#)

NIGP CODES

View All | First 1-3 of 3 Last

NIGP Code	Description
19300	CLINICAL LABORATORY REAGENTS AND TESTS (BLOOD GROUPING, DIAG
94800	HEALTH RELATED SERVICES (FOR HUMAN SERVICES SEE CLASS 952)
94855	Medical and Laboratory Services (Non-Physician)



Poll:

Where do bidders need to register to receive automatic notifications of solicitations from agencies and campuses?

- a) eSupplier Bidder Portal only
- b) VendorNet only
- c) eSupplier for agencies and VendorNet for campuses

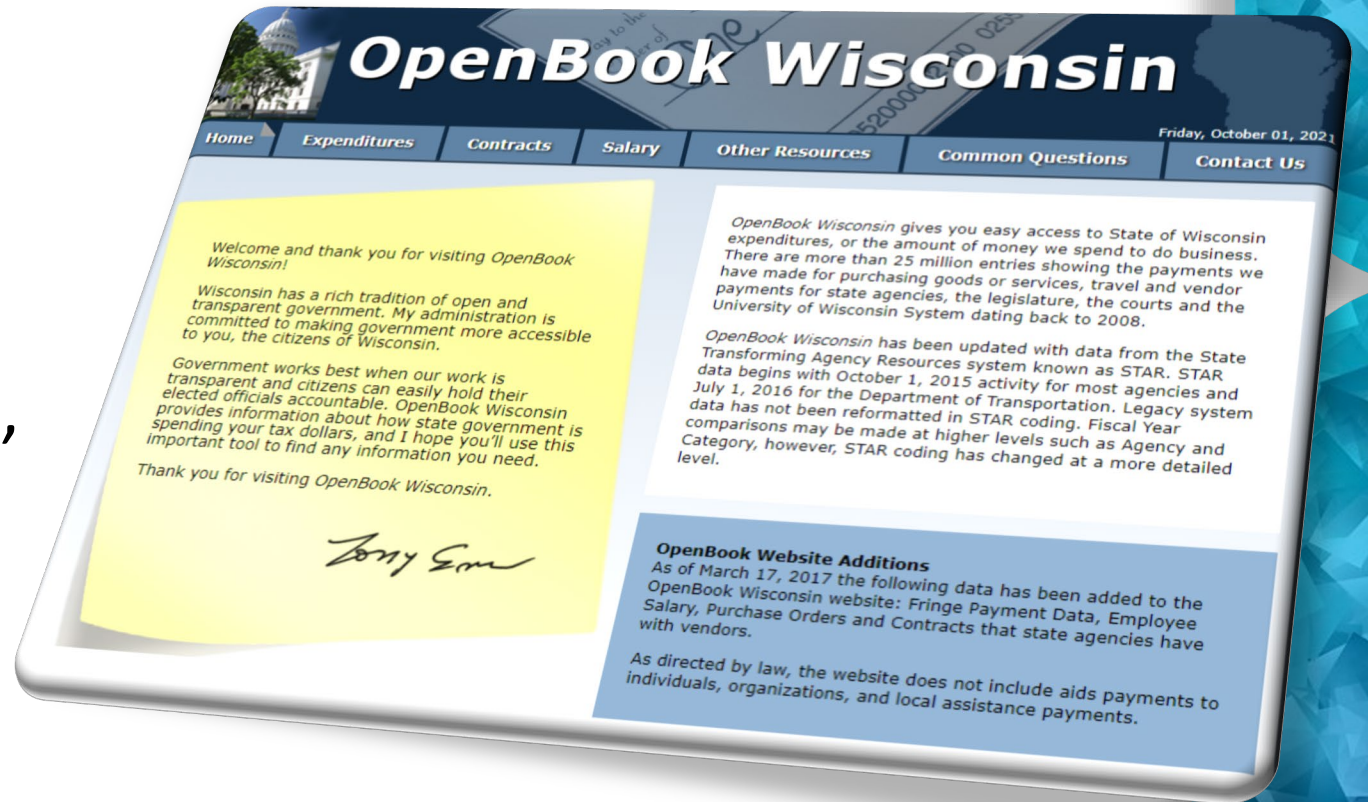
OpenBook Wisconsin

<http://OpenBook.wi.gov>

Expert: Cathy Neidner, CAPS

OpenBook Wisconsin

- Makes State government transparent for the citizens of Wisconsin
- Access to all State expenditure data for State agencies, legislature, Courts, and UW System



Poll:

How often is data updated
on OpenBook?

- a) Each quarter
- b) Each month
- c) Every two weeks
- d) Every night



Public Notices

<http://PublicNotices.wi.gov>

Expert: Cathy Neidner, CAPS

Public Notices

- Procedures for posting public and legal notices for certain procurement transactions (PRO-601)
- Noncompetitive negotiations (aka “sole source”) and general waivers posted on the site

The screenshot shows the 'Public Notices' website. At the top right, the title 'Public Notices' is displayed. On the left side, there is a navigation menu with four items: 'Public Notices Home' (highlighted in yellow), 'Search Notices' (highlighted in yellow), 'Public Notices Login' (highlighted in yellow), and 'Wisconsin.Gov Home' (highlighted in blue). The main content area includes the following text:

PUBLIC NOTICES HOME PAGE [FAQ](#)

Welcome

This website contains material of public interest posted by Wisconsin state and local governmental entities. Use the Search Notices function to find legal notices by keyword, category, and/or organization.

A listing of active public notices for State of Wisconsin procurements can be located by selecting "Procurement" from the drop down menu for "Category".

<http://publicnotices.wi.gov/> implements section 16.75, Wisconsin Statutes, which allows for use of the Internet to post due notice for certain procurements. Specifically, "... due notice inviting bids shall be published as a class 2 notice, under ch. 985 or posted on the Internet at a site determined or approved by the department." The State of Wisconsin Bureau of Procurement policy on Legal/Public Notice, [PRO-601](#), can be found at vendornet.wi.gov/genprocurement/publicnotices.aspx under "Public Notices".

The Public Notices Application System can also be used to post other notices such as press releases, meeting notices and meeting minutes. Municipalities and state agencies that utilize the Public Notices Application System for purposes other than Chapter 16 postings must adhere to applicable statutes related to these postings. The posting of material in this system does not supercede any statutory requirement for public posting.

At the bottom of the page, there are links for [Legal/Acceptable Use Policy](#) and [Privacy Notice](#).



Poll:

True or False: If a solicitation is posted on eSupplier, a public notice is automatically generated.

- a) True
- b) False

Supplier Diversity Program

<https://SupplierDiversity.wi.gov>

Expert: Cathy Neidner, CAPS

Supplier Diversity Program

- Certified MBEs
 - 5% price preference
 - 5% spending goal
- Certified DVBs
 - 5% price preference
 - 1% spending goal



Poll:

True or False: If a MBE or DVB isn't certified in the State of Wisconsin, then they cannot submit a bid.

- a) True
- b) False



Grant Exemptions

[PRO-504](#)

Expert: Jessica Potter, WisPro

Terri Lenz, SBOP

Poll:

Have you ever had experience with
Grant Exemptions?

- a) Yes, I know way too much about them
- b) Yes, but only once or twice
- c) I don't even know what a grant exemption is

Grant Exemptions

- Many grants, particularly federal grants, require the agency to follow their “local” procurement code to competitively select who the recipients will be
- Even if the grant is exempted by SBOP from Ch. 16 processes, agencies still need to follow a competitive selection process unless the grant announces a specific entity or organization
- Grant guidance is provided in SPM [PRO-504](#), the Checklist for a Request for Exemption of a Grant ([DOA-3048](#)), and the [Grants & Non-Procurement Transaction Visual Guide](#) (*next slide*)

GRANTS AND NON-PROCUREMENT TRANSACTIONS: A VISUAL GUIDE

Some purchases, either based on their nature, who they are with, or who they benefit, may be exempt from procurement rules. Before using this guide, first determine if it applies to you. This guide does *not* apply to you if:

- ✓ Good/service is covered by a mandatory contract
- ✓ Governed by special procurement rules (waivers (sole source or general); legal services; vehicles; printing)
- ✓ Your purchasing situation is not covered by the transaction types covered in this guide

My supplier is a state agency



Interagency

Spend with another State of Wisconsin agency, where they are your direct supplier, is not considered a procurement transaction. The notable exception to this is spend on signage from the Department of Corrections. All sign purchasing, even if the supplier is DOC, must be competitively bid if valued over \$3,500.

Approval needed by State Bureau of Procurement?
None

My supplier is the federal government



Intergovernmental

With the notable exception of printing, payments made to the federal government for goods or services are not considered procurement transactions. They qualify as intergovernmental transactions under the authority of §16.75(6)(a), Wis. Stats.

Approval needed by State Bureau of Procurement?
None

My supplier is a utility company



Utilities

Payment for utility services can be made to only one source, which is the only source as a result of a regulated or natural monopoly.

Telecom services are typically not able to be classified as utility payments because there is a competitive market.

Approval needed by State Bureau of Procurement?
None

My agency received grant funds



Grants

Receiving grant funds **does not** automatically exempt the expenditure of those funds from procurement rules or a competitive process. There are conditions that must be met for grant spending to be considered exempt from procurement rules.

Who is the beneficiary or “user”?

If the agency itself is getting value from the good or service purchased with the grant funds, it is not eligible for exemption. Grants are transfers of things of value to recipients to carry out a public purpose of support or stimulation.

What is the selection process?

Many grants, particularly federal, will require the agency to follow their applicable or “local” procurement code to competitively select the recipients of the pass-through grant funding. Even if the grant is exempted by the Bureau from Ch. 16 processes, agencies still need to follow a competitive selection process unless the federal grant announces a specific entity or organization.

Approval needed by State Bureau of Procurement?
Yes. See PRO-504, Grants and Other Non-Procurement Transactions

My agency is making a payment set by state statute



Payment Pursuant to Statute

If a payment needs to be made because state statute specifically permits only that provider to receive the funds, and the rate of reimbursement is set by state statute, it is considered a non-procurement transaction. However, it must be exempted first.

Approval needed by State Bureau of Procurement?
Yes. See PRO-504, Grants and Other Non-Procurement Transactions

Use of Required Systems and Websites

This is an illustration of when, in the procurement, purchasing and contracting process, you would use state procurement systems and websites. See [PRO-103, Procurement Systems](#).

System	Identify Need	Develop Solicitation	Issue Solicitation	Review/Award	Post Contract	Purchase Transactions	Manage Contract
RPA.wi.gov	If waiver is most appropriate, per PRO-501 (Waiver), use this system to enter request and receive approval. Contract cannot be awarded until approval received.						Use system to request RPA amendments during contract term (as needed).
Public Notices Website	If RPA, agency/campus posts public notice at time of RPA request		Integration between VendorNet and eSupplier generates public notice for solicitation				
VendorNet	Review potential bidders	Download templates and forms to use in development.	Campuses post solicitations, amendments. Anyone can search posted bids. Bid responses cannot be responded to or reviewed in the system.		Create contract page and search for posted contracts. Agencies and campuses amend, renew, expire contract pages.		
eSupplier/STAR (Full System)	Review potential bidders	STAR agencies build solicitation, attach documents	STAR agencies post on eSupplier	STAR agencies review, conduct scoring, issue award	STAR agencies create transactional contract	STAR agencies issue purchase orders	STAR agencies renew, expire transactional contract
Supplier Diversity Program Website	Review potential bidders, use outreach to encourage registration on eSupplier Portal.					Search for potential suppliers for purchases under \$50K	
WisBuy Marketplace					Determine if contract could be enabled online catalog	Make purchases on online catalogs in marketplace	Contract managers review price changes in new catalogs posted to marketplace
OpenBook Wisconsin					Link to VendorNet and other contract websites on "Other Resources" tab	STAR agencies have payment data sent via integration to OpenBook. Campuses report transactions	Public can identify contract purchases
Contract Sunshine	Several sites maintained by the state of Wisconsin provide the vast majority of the required (under Wisconsin Contract Sunshine Act) information. Those sites are VendorNet; Public Notices and Open Book Wisconsin. If state agencies notify Ethics Commission staff of information they believe is required to be posted under Wis. Stat. § 16.753(4), but that is not displayed on any other site, that information will be posted on this website.						

General Procurement or Other Questions?

Expert: Dealer's choice!

Enter your questions into the LIVE Q&A box!



Thanks for participating!