5.0 Purchase Methods Not Requiring a Solicitation Process Report
December 2016
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5 - Purchase Methods Not Requiring a Solicitation

Overview

When a University System Department has completed their research and identified the need for a good or service that does not require a competitive solicitation, they communicate those requirements through the Requisition process that conforms to the expectations of University Purchasing. These include: Small Purchase, Small Purchase (P&A), Sole Source, Sole Economically Feasible Source, Exemptions, Emergency Purchase and Quick Purchase.

Once the requisition is submitted by the University Department to University Purchasing, Purchasing will review and verify the request and its supporting documents to determine if it can move forward as a purchase not requiring a competitive solicitation. The majority of these purchase types are posted on the Illinois Procurement Bulletin, Public Institutions for Higher Education.

Illinois Mandate Symbol - 🎓

University Policy Symbol - 🎓

Professional Mandate Symbol - 🎓
5 Purchase Methods Not Requiring a Solicitation

Process Executive Summary

Business Process

The process begins after a member of the University department determines the need for a good or service. If the University Department believes that a competitive solicitation is not required, then a Purchase Method Not Requiring a Solicitation is selected.

These include:

- Small Purchase
- Small Purchase Professional and Artistic
- Sole Source, Sole Source Economically Feasible
- Exemption
- Quick Purchase
- Emergency Purchase

The University Department creates the requisition conforming to one of those methods, and submits the completed requisition to Purchasing. The requisition is assigned to a Procurement Buyer within University Purchasing who reviews and verifies each requisition and that it meets the selected Purchase Method. Once the requisition is verified as correct, the requisition is either ready for a Purchase Order to be created, or the Procurement Buyer routes to the State Purchasing Officer to obtain agreement that it meets the criteria specified for that Purchase Method. If there is agreement, it is then posted to the Procurement Bulletin.

Approach

The current state process activities were mapped by the Subject Matter Expert (SME) project team. A SIPOC diagram was created to capture the tasks executed by the department units. The SME project team identified opportunities for improvement and brainstormed potential solutions. Both the current state and proposed future state of the process were presented at customer focus group meetings in the University System, where the identified issues, solutions and the recommendations were discussed. The process report was presented to the Source2Pay Director Council where they ranked the proposed recommendations for implementation.

Key Findings

The Key findings discovered were:

- State oversight/involvement in these purchase methods severely slows down the processes.
- Overall lack of understanding as to what each contract type is and when to use it by the University Departments
- Opportunities exist for streamlining of forms and/or conversion to electronic format
- System improvements and training could alleviate much confusion and guide Users to select the correct purchase method
- Bulletin posting process is time-consuming and has some potential areas for improvement
- Inconsistent information given out by purchasing staff

Improvement Recommendations
The process team identified 35 suggested improvements. From the 35 suggested improvements, the team selected 9 improvements to recommend for implementation. The Director Council reviewed the 9 recommendations and ranked the proposed recommendations for implementation.

Listed are the top recommended improvements for implementation:

- Retrain University Departments on these purchasing methods (Short term: create the program)
- Communicate benefits of strategic awards and available consortia to University Departments
## Chapter 1a: SIPOC Diagram - Current State

<table>
<thead>
<tr>
<th>SUPPLIERS</th>
<th>INPUTS</th>
<th>PROCESS</th>
<th>OUTPUTS</th>
<th>CUSTOMERS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Who</strong> provides input to the process</td>
<td><strong>What</strong> goes into the process</td>
<td><strong>How</strong> the inputs are transformed to outputs</td>
<td><strong>What</strong> comes out of the process</td>
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<tr>
<td>University Department (Requisitioner)</td>
<td>Requisition</td>
<td>Receive Requisition</td>
<td>Sole Source Justification Form (SSJF) Part II</td>
<td>University Departments</td>
</tr>
<tr>
<td>Procurement Buyer</td>
<td>Supporting Documents: Quotes, contracts, (e.g. disclosures, Federal documents, Grant documents)</td>
<td>Review</td>
<td>Hearing documents</td>
<td>Procurement Buyer</td>
</tr>
<tr>
<td>Procurement Director</td>
<td>Sole Source Justification Form (SSJF) (includes Parts I and II)</td>
<td>Approve</td>
<td>PPB waiver/NA (no actions)</td>
<td>General Public (not Vendors and people who just want to search)</td>
</tr>
<tr>
<td>State of Illinois / SPO, CPO, PPB, PCM, EEC</td>
<td>Emergency Purchase Affidavit</td>
<td>Finalize</td>
<td>Expiration of statutory 30 days</td>
<td>Vendor</td>
</tr>
<tr>
<td>Vendors</td>
<td></td>
<td></td>
<td>Requisition ready for PO</td>
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</tbody>
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## Chapter 1b: SIPOC Diagram-Future State

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<thead>
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<th>Process Name</th>
<th>Date</th>
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</thead>
<tbody>
<tr>
<td>Purchase Methods Not Requiring a Solicitation</td>
<td>November 16, 2016</td>
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<table>
<thead>
<tr>
<th>SUPPLIERS</th>
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<tr>
<td>University Chief Legal Counsel</td>
<td>Certified Vendor list from OPD</td>
<td></td>
<td>Requisition ready for PO</td>
<td></td>
</tr>
<tr>
<td>Board of Trustees</td>
<td></td>
<td></td>
<td>Bulletin Posting</td>
<td></td>
</tr>
<tr>
<td>President of the University System</td>
<td></td>
<td></td>
<td>Recommendations for diverse Vendors from OPD</td>
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<tr>
<td>Office of Procurement Diversity</td>
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</tbody>
</table>
# Chapter 2: Suppliers

Suppliers provide input into the Purchase Methods Not Requiring Solicitation process.

## 2.1: University System Department (Requisitioner)

What they care about: Obtaining the correct goods or service per their completed Requisition  
When they care: Each time they submit a requisition to University Purchasing

## 2.2: Procurement Buyer

What they care about: Makes sure everything is within legal guidelines and compliant with the procurement code and policies.  
When they care: Each time they are presented a requisition for review

## 2.3: Procurement Director

What they care about: Ensuring that the Purchasing Buyers are processing items within legal guidelines and are compliant with procurement code and policies  
When they care: Each time a buyer presents them with a requisition for review

## 2.4: State of Illinois/SPO, CPO, PPB, PCM, EEC (see Glossary for definitions)

What they care about: State procurement code is followed  
When they care: Every time they are presented a State procurement request that needs review

## 2.5: Vendor

What they care about: Provides goods or services to the departments within the University System  
When they care: Each time they can be the supplier of the good or service

## 2.6: University Chief Legal Counsel

What they care about: Compliance with all laws, rules and procedures  
When they care: Each time a Purchase Requisition exceeds $250,000

## 2.7: Board of Trustees (BOT)

What they care about: Provides oversight, guidelines and authority for all purchasing done by the University System. Also provides approvals for all purchases over 1 million.  
When they care: Each time a good or service is purchases by the University System.
2.8: University President
What they care about: Compliance with all laws, rules and procedures
When they care: Each time a Purchase Requisition exceeds $1 million

Business Rules
None noted
Chapter 3: Inputs

Inputs are information or verification that goes into the research purchase option process.

3.1: Requisition

A request for purchase for goods or services

3.2: Supporting documents

Any documentation needed to support the purchasing process, this includes but not limited to: Quotes, contracts, disclosures, federal documents, and/or grant documents that are required to render a decision by either University Purchasing or State officials

3.3: Sole Source Justification Form

Form used to stipulate why a particular good or service can only be obtained from a single Vendor

3.4: Emergency/Quick purchase affidavit

Form used to stipulate why the purchase request meets the guidelines that allow for emergency or the urgent acquisition of goods or service.

Business Rules

<table>
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Statutory 14 days' notice of hearing that has to be posted for emergency extensions and sole source and add to the output
Chapter 4: Process

A process is defined as the method for transforming the inputs (such as a requisition) into outputs (such as a requisition ready for a purchase order).

4.1: Receive Requisition
University Purchasing receives requisition request from University unit for goods and services.

4.2: Review
University Purchasing Buyer reviews the requisition for compliance

4.3: Approval
University Purchasing Buyer receives approval from State (if necessary) to move forward with purchasing request.

4.4: Finalize
University Purchasing Buyer completes step necessary to prepare purchase order

Business Rules

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30 ILCS 500/1-10 “Full” Exemptions from the Procurement Code:

(1) Contracts between the State and its political subdivisions or other governments, or between State governmental bodies except as specifically provided in this Code.
(2) Grants, except for the filing requirements of Section 20-80.
5 Purchase Methods Not Requiring a Solicitation

(3) Purchase of care.
(4) Hiring of an individual as employee and not as an independent contractor, whether pursuant to an employment code or policy or by contract directly with that individual.
(5) Collective bargaining contracts.
(6) Purchase of real estate, except that notice of this type of contract with a value of more than $25,000 must be published in the Procurement Bulletin within 10 calendar days after the deed is recorded in the county of jurisdiction. The notice shall identify the real estate purchased, the names of all parties to the contract, the value of the contract, and the effective date of the contract.
(7) Contracts necessary to prepare for anticipated litigation, enforcement actions, or investigations, provided that the chief legal counsel to the Governor shall give his or her prior approval when the procuring agency is one subject to the jurisdiction of the Governor, and provided that the chief legal counsel of any other procuring entity subject to this Code shall give his or her prior approval when the procuring entity is not one subject to the jurisdiction of the Governor.
(8) Contracts for services to Northern Illinois University by a person, acting as an independent contractor, who is qualified by education, experience, and technical ability and is selected by negotiation for the purpose of providing non-credit educational service activities or products by means of specialized programs offered by the university.
(9) Procurement expenditures by the Illinois Conservation Foundation when only private funds are used.
(10) Procurement expenditures by the Illinois Health Information Exchange Authority involving private funds from the Health Information Exchange Fund. "Private funds" means gifts, donations, and private grants.
(11) Public-private agreements entered into according to the procurement requirements of Section 20 of the Public-Private Partnerships for Transportation Act and design-build agreements entered into according to the procurement requirements of Section 25 of the Public-Private Partnerships for Transportation Act.
(12) Contracts for legal, financial, and other professional and artistic services entered into on or before December 31, 2018 by the Illinois Finance Authority in which the State of Illinois is not obligated. Such contracts shall be awarded through a competitive process authorized by the Board of the Illinois Finance Authority and are subject to Sections 5-30, 20-160, 50-13, 50-20, 50-35, and 50-37 of this Code, as well as the final approval by the Board of the Illinois Finance Authority of the terms of the contract.

And here is the 30 ILCS 500/1-12 “Partial” exemption:
(a) This Code shall not apply to procurement expenditures necessary to provide artistic or musical services, performances, or theatrical productions held at a venue operated or leased by a State agency.
Chapter 5: Outputs

Outputs are the resulting documentation of approvals that are produced as part of the Purchase Methods Not Requiring Solicitation process.

5.1: SSJF part II

Part II of the Sole Source Justification Form is used as an output to the process once the sole source hearing has been cancelled, or the EEC determines a sole source can proceed after a hearing has been held.

5.2: Hearing documents

These documents are the CPO’s approval/disapproval to move forward after a hearing has been completed.

5.3: E-mail notifying of the PPB waiver or No Action (NA)

The work flow email is sent to the Buyer. The comments by PPB are posted to the Bulletin.

5.4: Requisition ready for PO in iBuy or Banner system.

Once the requisition and postings to the Bulletin are completed, the requisition is ready to move to the Purchase Order creation process

5.5: Bulletin Posting

Once the requisition has completed the review and hearing process, the notice and award is posted to the Bulletin

Business Rules

Expiration of statutory 30 days

Upon the completion of the statutory 30 day waiting period, the University Procurement Office can move forward with negotiating contract and/or completing the Purchase Order, we could receive the PPB’s waiver/NA prior to the 30 day expiration which would allow us to move forward at that time.
Chapter 6: Customers

Customers receive the output of the process.

6.1: University Departments

What they want: Prompt action on the requisition request

6.2: Procurement Buyer

What they want: Completed requisition with all necessary documentation to support the request. The Procurement Buyer may add additional documents and comments which could be added in iBuy, Banner, attachments to PO and, where applicable, posted to the Bulletin.

6.3: General Public

What they want: Access to information on purchases being made by the University System.

6.4: Vendor

What they want: Access to information for goods or services that the University is purchasing for which the Vendor may be able to supply that good or service.

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<td>NA</td>
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</table>
Chapter 7: Customer - Oversight Roles

7.1: Board of Trustees/ Audit Budget Finance and Facilities
What they want: Notification of any purchases over $1 million so that they can monitor adherence to all Federal and State laws and University Policy, and goals for diversity spending.

7.2: University Chief Legal Counsel
What they want: Compliance with all laws, rules and procedures

7.3: Procurement Director
What they want: Director has expectation that Purchasing Buyer will apply acquired knowledge into the request forms (SSJF, Emergency Affidavit) that will result in Procurement oversight approval and lead to timely Bulletin award.

Business Rules
7.1. Exceptions: Bulk food, consortium purchases, oil, gas, utilities do not need BOT approval.
Chapter 8: Questionnaire for Current State Analysis

1. Why does the process exist?
   - Statutory requirements:
     - Sole Source & Sole Sources Economically Feasible: Purchasing Laws citation reference # 30 ILCS 500/20-25
     - Exceptions: II. Purchasing Laws citation reference: 1-10(b) (2) Grants
     - Intergovernmental 50 ILCS 830/15 –County Board
     - Exceptions 30 ILCS 500/1-10 (b) thru (i)
     - Utility “Section 16-111.5B of the Illinois Public Utilities Act (the “Act”) and Section 1-75 of the Illinois Power Agency Act.
     - Reduce the number of competitive solicitations
     - All purchase methods discussed here require State approval other than small purchase

2. What is the purpose of the process?
   - **1) Small Purchase**
     Purpose: To allow departments to obtain goods and services with minimal administrative oversight up to the small purchase limit.

   - **2) Small Purchase Professional & Artistic (P&A)**
     Purpose: Transparency for small P&A purchases with no need for informal solicitation but to ensure posting to the Bulletin.

   - **3) Sole Source (SS):**
     Purpose: When only one Vendor can fulfill the need for the specifications of the purchase, or if there is a grant requirement specifying the purchase source.

   - **4) Sole Economically Feasible Source (SEFS)**
     Purpose: Due to large variance in price from Vendors with no expectation of reduction, or previous investment and knowledge of product.
     SS and SEFS is the same process.

   - **5) Exemption**
     Purpose: Procurement code allows for purchases meeting certain requirements to be exempt from most procurement rules, Currently at UIUC these are posted to the Bulletin, in the future state all Universities will post to bulletin.

   - **6) Emergency Purchase**
     Purpose: To obtain critical operational needs in matters of safety and health.

   - **7) Quick Purchase**
     Purpose: To allow for a purchase during a limited window of opportunity to make the purchase.
3. **What are the process boundaries (i.e., when does it start and end?)**
The process starts when a requisition has been received by the University Purchasing office. The process ends when the Procurement authority has been achieved and the award notice if required is posted to the Bulletin. Thereafter the requisition can be converted into a Purchase Order.

4. **What are the major activities/steps in the process?**
See Chapter 4: Process (Ctrl-click to follow links)

5. **What is the expected outcome or output of the process?**
See Chapter 5: Outputs (Ctrl-click to follow links)
To obtain authority and complete the purchase.

6. **Who uses the output of the process, and why?**
See Chapter 6: Customers (Ctrl-click to follow links)
All University system departments have a need to purchase goods and services, utilizing the sole source or Emergency/Quick purchase or Exception process.

7. **Who benefits from the process, and how?**
See #6 – all University system departments benefit with the receipt of necessary goods and services in order to operate their departments. This includes requisition entry in either iBuy/Banner as well as contract entry or the Contract Approval Routing Form (CARF) [not needed for exceptions] related to sole source, quick purchase, and emergency or exception contracts – iCS.

8. **What information is necessary for the process?**
See Chapter 3: Inputs (Ctrl-click to follow links)
**Sole Source & Sole Sources Economically Feasible:** If applicable US Patent numbers are needed. Also history of previous purchases; compelling justification for determination to avoid competitive solicitation; term consideration; cost/pricing and summary statement as to why only a sole source is viable.

**Emergency and Quick Purchase:** Compelling justification for Emergency/Quick determination is needed. Consider the “conditions” provided by Procurement Rules. Also requires a summary statement as to why only an Emergency/Quick purchase is viable. If applicable, for an emergency purchase, pictures of damage are helpful. Discuss the Vendor selection: was competition considered? Also history of Vendor experience is helpful.

**Exemptions:** Consider the “conditions” and document evidence provided by the funding source. Also requires a summary statement as to why the Exemption is viable.

**Emergency extensions** may have an extension of no more than 90 days from the original emergency

9. **Where does that information come from?**
See Chapter 2: Suppliers (Ctrl-click to follow links)
That information comes from the individual department and the Vendor involved (quotes, proposals, SOW’s, Vendor contracts).

10. **What effect does that information have on the process and output?**
**Sole Source & Sole Sources Economically Feasible:** Successful sole source takes a minimum of 4 weeks. A sole source request involving a “Hearing Challenge” may take 4-6 weeks.

**Successful Emergency/Quick purchase & Exceptions:** takes 1-3 days.

11. **Who is primarily responsible for the process?**
Requestor and Purchasing.

12. What other units/organizations participate in or support the process?
   - University departments
   - State of Illinois Chief Procurement Officer’s office
   - Procurement Policy Board
   - OBFS Purchasing/Procurement buyer
   - General Public (people who want to monitor what is being purchased with their tax dollars)
   - Vendor
   - University Legal Counsel (may be needed for purchase contracts).

13. What Information Technology system(s) support the process?
   - iBuy
   - Bulletin
   - Banner
   - Email
   - IPG
   - SAMS
   - iCS (Illinois Contract System)

14. What policies guide or constrain the process?
   - University, Chief Procurement Officer Rules, State statutes, departmental processes
   - Illinois Procurement Code, University (OBFS) Purchasing Policy – see section Sections 6, 7, 8, 11, 13, 15, 17, 18, 21, 7.2; 16.1.4; and 17.1.

15. How often does the process get executed?
   - Small Purchase
     - Daily
   - Small Purchase P&A/Sole Source/Sole Source Economically Feasible
     - Several times per month
   - Exemptions
     - Less frequently
   - Emergency Purchase/Quick Purchase
     - Very infrequently

16. What are potential defects with respect to the process?
   - Small Purchase:
     - None identified
   - Small Purchase Professional & Artistic (P&A) and Exemption:
     - Easy to forget to post to Bulletin which would be an infraction.
   - Sole Source/Sole Source Economically Feasible, Quick Purchase
5 - Purchase Methods Not Requiring a Solicitation

- Easy for Buyer to forget to post award after PPB approval as this is the only Bulletin process that requires the Buyer to post the award. If forgotten, it can lead to a ratification with the Chief Procurement Officer which can take a lot of time and also cause delays with the department.

- **Emergency Purchase**
  - None identified

- **Quick Purchase**:
  - Bulletin posting could be missed.
    - **How often do they occur?**
      - Very infrequently

17. **What types of challenges have employees who participate in the process raised?**

   All processes:
   Timing can be an issue depending on what documents are needed from Vendors and how quickly Vendors respond. If financial disclosures are needed, it is not uncommon to have to go back and forth with Vendors 3 or more times until they get the forms correct.

   **Sole Source/Sole Source Economically Feasible:**
   Many of these types of purchases are for researchers who needed it yesterday although they submitted the request today. They are generally not happy with the time it takes to get through the process. Working with the departments to get the SSJF prepared can be time consuming. Once it is approved by the SPO, then it still has a minimum of two weeks to get through the State's process. There is also the possibility of a Vendor protest which further delays the process until the EEC makes a determination.

   A sole economically feasible source is where other Vendors may be able to provide the needed supply or service but, for economic-related reasons, only one Vendor is reasonable.

   **Emergency Purchase:** Waiting for sign-off by AVP and CPO.

   Some University Department Unit employees can't comprehend the process, or have tunnel vision and want to purchase what they want.

18. **What types of challenges or concerns have customers raised?**

   All processes: The time to get things through the process can be long. Vendor cooperation varies dependent on Vendor willingness to respond in a timely manner.

   **Sole Source/Sole Source Economically Feasible:**
   If the State doesn't approve it as a sole source, customers have lost time and will now need to go through the solicitation process.

19. **Will the process be changed by another initiative in the near future?**

   **Small Purchase**
   Small purchase level was just recently raised by about $25K from what it was in August. P-Card levels could be raised which would allow cardholders to not have to submit an invoice voucher or a requisition.
State processes could change for the worse. Positive changes in State process unlikely. The University has tried for 8 years or more to get approval for less oversight.

Potential decision to utilize a Source to Pay systems will impact the process. Changes to Purchasing Laws and/or Higher Education Rules may also occur and impact these processes.
Chapter 9: Questionnaire for Potential Process Improvement Candidates

1. How would the process operate differently in the “Perfect Situation?”

The perfect situation would be to completely eliminate the State oversight from the purchasing process. This would allow departments to obtain their goods and services in a more efficient time frame, especially if a request could be automated or streamlined and deadlines changed. Furthermore, the perfect situation would allow the Purchasing Department to be given more authority to run the process through the creation and enforcement of internal policies and procedures.

2. What does the team hope to achieve through this improvement?

1. Restored and increased authority to Purchasing staff prior to 2010 State involvement
2. Limited or no State oversight
3. More efficiency in the process including
   a. A potential reduction of the time involved with the current process would advance the goals of both the requestor and OBFS
   b. The SPO/CPO review would be eliminated.
   c. All forms would be geared towards the University policies and procedures.
4. Increased Vendor participation

3. Who would benefit from the desired improvement to the process?

End users, especially requestors, Vendors, Purchasing, students because many of the goods and services benefit the student body, the University System.

   a. How would we know?

   Purchasing should see improvements immediately through fewer complaints from Business managers about the process steps, length and process handlers. Increased customer satisfaction by the University Business managers with the Procurement staff through feedback.

4. What data can be provided with respect to the process performance (e.g. service rating, cycle time, customer survey responses, etc.)?

Service rating, cycle time, customer survey responses from the viewpoints of the end users, Purchasing, and Vendors. The Bulletin notice status could be a valuable tracking resource.

5. Who should be included in any improvement discussions for the process?

University President, AVPs, State legislature, CPO’s office, Executive Ethics Commission, University System lobbyists, University end users, Purchasing & Purchasing Directors, Procurement Officials, Bulletin Committee members, Vendors who have experienced challenges with State oversite, and taxpayers.
Chapter 10: Current State Metrics

Metrics in three areas are being collected on each process. These metrics will be used to measure success in the future state.

- How long does the process take from Start to finish?
  - Small Purchase—Anywhere from one day to several weeks.
  - Small Purchase (P&A) —Anywhere from one day to several weeks.
  - Sole Source—Anywhere from 30 days to two or three months.
  - Sole Economically Feasible Sole Source—Anywhere from 30 days to two or three months.
  - Exemptions—Anywhere from one day to several weeks.
  - Emergency Purchase— from 24 to 48 hours to obtain award notice.
  - Quick Purchase— from 24 to 48 hours to obtain award notice.

- How many touchpoints are there per process?
  - On average there are about 14 different touch points for each process; this number varies depending on if the solicitation requires a hearing or extension.

- How many steps are involved in each process?
  - Small Purchase—10 Steps
  - Small Purchase (P&A) —22 Steps
  - Sole Source—35 Steps
  - Sole Economically Feasible Sole Source—35 Steps
  - Exemptions—22 steps
  - Emergency Purchase—22 Steps
  - Quick Purchase—22 Steps
Chapter 11: Feedback from Customer Focus Groups – Current State

The Current State process was presented to each University’s Customer Focus Group on October 25, 26 & 27, 2016. A total of 17 people attended with 4 people in attendance from UIC, 1 person from UIS, and 12 people from UIUC.

Focus Group Summary

- Majority of the focus group participants submit small purchases and emergency requests
- Several of the focus groups representatives have never heard of some of these contract types such as Quick Purchases and several do not use or most of these contract types such as Sole Economically Feasible Source.
- Majority of the units do have at least an informal pre-approval process for all purchases that get routed to one designated staff member within the unit to complete the requisition and determine which contract type to use.
- The major issues from the focus groups are
  - Not knowing what each contract type is and when to use it
  - Takes too much time to get a Vendor added or updated in the system
  - Inconsistent information given out by purchasing staff
  - Not having a list of buyers to contact and knowing what they are assigned too

University Focus Group Report

Small purchase - any forms to do this? Or do you have a process

- No forms, no formal approval process but goes through our assistant dean for approval
- Have monthly email that list what they want to order and have one person who puts in these orders
- Use Interdepartmental form then it goes to director for approval
- UIS uses School Dude for these and requires Materials order form (from school dude), these paper forms are dropped in a dropped box and UIS enters a completed date and closes these, try to do as much as possible in iBuy

P&A Small purchases

- Either don’t use, or uses inter departmental form
- Just use internal form and request quotes
- No clear expectations on how long the new process to post these to the bulletin and department was delayed
- This is a one-time option and next year department will have to go out to solicitation - loose the flexibility to pick what Vendor
- UIS has never used these

Sole Source - any other forms?

- no forms
5 Purchase Methods Not Requiring a Solicitation

- No additional forms
- UIS really don't use these but knows they have to get BOT approval

**Sole economically feasible source - any other forms or pre-approval process?**
- Don't use or have Vendors for this
- UIS has never used these

**Exemption - forms or pre approval process?**
- Have Feed and bedding Vendors, no special forms, but have work out the costs and contract with the Vendor
- UIS has never used these

**Emergency Purchasing - forms or approval process?**
- Yes they have these, take pictures, document everything and makes multiple copies, look up existing Vendors who have helped with emergency, in the past have to look up in white pages for the Vendors
- For research lab and automatic doors break and need to be fixed, some Vendors require a service call quote first before they do the work
- Many times Vendors don't want to come out without a PO, and then the PO amount may be wrong
- Some Vendors don't accept credit card as payment
- Gather all the documents and send to purchaser in an email (as justification), and put in the emergency request ASAP
- Call Vendor in for the job, then later processed the emergency the following work day

**Quick Purchase - forms or approval process?**
- Yes they do these, not as complicated as they thought and the Vendor was willing to work with us
- Need to have a quote before purchasing and the quote before PO
- UIS has never heard of this

**Issues**
- Clarification on what is an emergencies or how do you define an emergency?
- Users not familiar with emergency affidavit
- Not sure when to use a Sole Economically Feasible Source method
- Units have never heard of a quick purchase - more clarification and knowledge needed to advise that it exists
- Small purchase: increase the threshold of what's allowed in iBuy without approval
- Be able to attached your quotes at the same time you submit your requisition in Banner
- Software purchases under $5k need to have a more streamlined process especially since some Vendors won't accept a P-Card
• When a Vendor doesn't take a P-Card and you have to use the exception process is very time consuming
• A major delay when exceptions go to Purchasing
• Buyers’ names disappeared from the Contact list and it’s really hard to figure out who to call
• Inconsistent info from purchasing and which method to use
• Just because a particular buyer worked on the last contract doesn’t mean it’s the same buyer for the renewal or next contract - gets units frustrated
• Takes too long for it to get through the approval process and get a PO number
• When Vendors are not on the approved Vendors list in iBuy, there are often delays with getting Vendors into the system quickly
• Obtaining updated Vendor info such as their address could be done ahead of time if we knew it needed to be done

Recommendations
• More training and knowledge about existing forms
• Workflow on all these types
• Need guidelines on how to declare something is an emergency
Chapter 12: Opportunities for Improvements

The following opportunities for improvement were identified through team discussions. Issues were categorized into six categories, covering State/Regulatory, Forms automation, Training/Communications, Policy and Systems. Items in **BOLD** are addressed by the [Suggested Improvements in Chapter 13](#).

### State/Regulatory – Issues that are rooted or caused by State rules, policies and oversight

<table>
<thead>
<tr>
<th>C1.x</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>C1.1</td>
<td>Remove State from procurement process</td>
</tr>
<tr>
<td>C1.2</td>
<td>CPO/SPO too slow</td>
</tr>
<tr>
<td>C1.3</td>
<td>Waiting for SPO to Approve</td>
</tr>
<tr>
<td>C1.4</td>
<td>Double steps for SPO/CPO approval</td>
</tr>
<tr>
<td>C1.5</td>
<td>Bottleneck with SPO/CPO</td>
</tr>
<tr>
<td>C1.6</td>
<td>PPB/SPO decision too slow</td>
</tr>
<tr>
<td>C1.7</td>
<td>Having to put all small dollar P&amp;A’s into the Bulletin</td>
</tr>
<tr>
<td>C1.8</td>
<td>P&amp;A threshold too low</td>
</tr>
<tr>
<td>C1.9</td>
<td>The 90 day term on emergencies is not long enough – they often have to be extended</td>
</tr>
<tr>
<td>C1.10</td>
<td>Putting date and time in hearing notices causes problems</td>
</tr>
<tr>
<td>C1.11</td>
<td>Very timing consuming having to get certifications and registrations with BOE (board of elections), Sec Of State (SOS) for purchase</td>
</tr>
<tr>
<td>C1.12</td>
<td>Oversight should consider short term exception</td>
</tr>
<tr>
<td>C1.13</td>
<td>Having to get sole source disclosures</td>
</tr>
<tr>
<td>C1.14</td>
<td>Time spent scheduling hearings when they aren't usually held</td>
</tr>
<tr>
<td>C1.15</td>
<td>Too many quotes required</td>
</tr>
</tbody>
</table>

### Forms Automation – automate or systemize any forms used within the process

<table>
<thead>
<tr>
<th>C2.x</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>C2.1</td>
<td>Update questions on SSJF</td>
</tr>
<tr>
<td>C2.2</td>
<td>Buyer, SPO can't do track changes on SSJF</td>
</tr>
</tbody>
</table>

### Training/Communications – Issues that are due to lack of training and knowledge about the process or systems

<table>
<thead>
<tr>
<th>C3.x</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>C3.1</td>
<td>Going back and forth with departments and SPO to get SSJF ready</td>
</tr>
<tr>
<td>C3.2</td>
<td>Contact from units about status of request</td>
</tr>
<tr>
<td>C3.3</td>
<td>There is no accountability with departments for stringing</td>
</tr>
<tr>
<td>C3.4</td>
<td>Problems because departments think everything is a sole source</td>
</tr>
<tr>
<td>C3.5</td>
<td>No rules for multiple purchases to same Vendor from same requestor (“stringing”)</td>
</tr>
<tr>
<td>C3.6</td>
<td>Department doesn't understand marketplace evaluation process</td>
</tr>
</tbody>
</table>
### Policy – Issues caused by certain policies in place or lack of mandating policies

<table>
<thead>
<tr>
<th>C4.1</th>
<th>Department suffers minimal consequences for not utilizing available resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>C4.2</td>
<td>OBFS does not mandate use of Master Contracts, IPHEC etc.</td>
</tr>
</tbody>
</table>

### Policy/Training – Issues that cross and are caused by policy and training

| C5.1 | There is little use of cooperative and master agreements, group purchase organizations |

### Systems – Issues caused by systems and applications used as part of the process

<table>
<thead>
<tr>
<th>C6.1</th>
<th>Buyers are responsible to post Sole Source award notification to the public, does not happen on other solicitations</th>
</tr>
</thead>
<tbody>
<tr>
<td>C6.2</td>
<td>If estimate for the dollar amount, reminder for final amount posting</td>
</tr>
<tr>
<td>C6.3</td>
<td>Systems don’t communicate</td>
</tr>
<tr>
<td>C6.4</td>
<td>At 30 day automate “N/A”</td>
</tr>
<tr>
<td>C6.5</td>
<td>Missing emergency posting requirements</td>
</tr>
<tr>
<td>C6.6</td>
<td>Manual processing of no hearing notice</td>
</tr>
</tbody>
</table>
Chapter 13: Suggested Improvements

The following recommendations were suggested by the either the process team members, director council and focus groups. Not all improvements were selected by the process team. The ones in **BOLD** were recommendations which were presented to the University Focus Groups for feedback.

<table>
<thead>
<tr>
<th>Number</th>
<th>Change Category</th>
<th>Suggested Improvement</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>State Regulatory</td>
<td>Legislative relief</td>
</tr>
<tr>
<td>2</td>
<td>State Regulatory</td>
<td>PPB policy change</td>
</tr>
<tr>
<td>3</td>
<td>State Regulatory</td>
<td>Remove SPO approval</td>
</tr>
<tr>
<td>4</td>
<td>State Regulatory</td>
<td>Increase P&amp;A threshold to small purchase threshold</td>
</tr>
<tr>
<td>5</td>
<td>State Regulatory</td>
<td>Authorize a short term exception above the threshold for small purchase</td>
</tr>
<tr>
<td>6</td>
<td>State Regulatory</td>
<td>Create resource database for state contracts</td>
</tr>
<tr>
<td>7</td>
<td>State Regulatory</td>
<td>Require fewer quotes</td>
</tr>
<tr>
<td>8</td>
<td>State Regulatory</td>
<td>Improve CPO website with more resources</td>
</tr>
<tr>
<td>9</td>
<td>State Regulatory</td>
<td>Remove requirement to post Professional &amp; Artistic under $20k contracts to the Bulletin</td>
</tr>
<tr>
<td>10</td>
<td>State Regulatory</td>
<td>Stop going through CPO/SPO approval process</td>
</tr>
<tr>
<td>11</td>
<td>State Regulatory</td>
<td>Mandate deadline for SPO/CPO decisions</td>
</tr>
<tr>
<td>12</td>
<td>State Regulatory</td>
<td>Do not schedule hearing until needed</td>
</tr>
<tr>
<td>13</td>
<td>State Regulatory</td>
<td>Get rid of requirement for Secretary of State/Board of Elections</td>
</tr>
<tr>
<td>14</td>
<td>State Regulatory</td>
<td>Remove SPO/CPO designate</td>
</tr>
<tr>
<td>15</td>
<td>State Regulatory</td>
<td>Remove CPO’s office</td>
</tr>
<tr>
<td>16</td>
<td>Forms Automation</td>
<td>Create/Update fill-in form and track changes</td>
</tr>
<tr>
<td>17</td>
<td>Forms Automation</td>
<td>Make forms editable</td>
</tr>
<tr>
<td>18</td>
<td>Forms Automation</td>
<td>Simplify financial disclosures/conflict of interest form</td>
</tr>
<tr>
<td>19</td>
<td>Forms Automation</td>
<td>Emergency Affidavit, SSJF, Emergency extension, Change order form</td>
</tr>
<tr>
<td>20</td>
<td>Communication Training</td>
<td>Retrain departments on these purchasing methods</td>
</tr>
<tr>
<td>21</td>
<td>Communication Training</td>
<td>Communicate benefits of strategic awards and available consortia</td>
</tr>
<tr>
<td>22</td>
<td>Communication Training</td>
<td>Improve OBFS website</td>
</tr>
<tr>
<td>23</td>
<td>Communication Training</td>
<td>Provide examples of past purchases meeting criteria</td>
</tr>
<tr>
<td>24</td>
<td>Communication Training</td>
<td>Provide SPO guide to sole source</td>
</tr>
<tr>
<td>25</td>
<td>Communication Training</td>
<td>Enhancements to resources provided through bulletin from state of IL</td>
</tr>
<tr>
<td>26</td>
<td>Policy</td>
<td>OBFS needs to enforce policies already in place and create new policies for additional mandates</td>
</tr>
<tr>
<td>27</td>
<td>Policy</td>
<td>Pull spend analysis of commodities and determine if a Master Contract is needed</td>
</tr>
<tr>
<td>28</td>
<td>Policy</td>
<td>Mandating use of Master Contracts</td>
</tr>
<tr>
<td>29</td>
<td>Systems</td>
<td>Automate process for sole source award</td>
</tr>
<tr>
<td>30</td>
<td>Systems</td>
<td>Automate posting of no-hearing notices</td>
</tr>
<tr>
<td>31</td>
<td>Systems</td>
<td>Automate SPO approval</td>
</tr>
<tr>
<td>Number</td>
<td>Change Category</td>
<td>Suggested Improvement</td>
</tr>
<tr>
<td>--------</td>
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<td>-----------------------</td>
</tr>
<tr>
<td>32</td>
<td>Systems</td>
<td>Integrate of system of records, Vendor system, contract system and Bulletin</td>
</tr>
<tr>
<td>33</td>
<td>Systems</td>
<td>Workflow and status – ability to see where requisition resides in entire process</td>
</tr>
<tr>
<td>34</td>
<td>Systems</td>
<td>Ability for buyers to access notices assigned to another buyer</td>
</tr>
<tr>
<td>35</td>
<td>Systems</td>
<td>Ability to return requisition in Banner</td>
</tr>
</tbody>
</table>
Chapter 14: Feedback from Customer Focus Groups – Future State

The Future State process and recommendations were presented to each University’s Customer Focus Group on December 6, 7, & 8, 2016. A total of 12 people attended with 4 people in attendance from UIC, 1 person from UIS, and 7 people from UIUC.

University Focus Group Summary

- Majority of the focus groups participants all agreed to the recommendations presented
- Several of the focus groups representatives are in favor of mandating training as long as it is consistent.
- Many were in favor of mandating the use of certain purchases like master contracts, but stress we must be able to handle exceptions
- Majority of the units are in favor of one system or making the majority of the process automated
- In addition to the recommendations discussed, the focus group participants also stressed the following:
  - Make sure we account for exceptions for certain processing
  - Consistent information given out by purchasing staff would solve and/or eliminate issues
  - An automatic way to enter what you want to buy and have a system guide the user would be extremely useful

Recommended Solution Feedback by Category

State Regulatory
- Group all agrees to the recommendations, very supportive of anytime officers can be removed from the process
- Asked if our processes compare to other states processes and do they have the same oversight

Forms Automation
- Group all agrees to the recommendations
- What financial forms would be included? Any and all forms used during this process
- Recommended a paper version be offered if a vendor can’t submit electronically (Ex. Farmers)

Training/Communications
- Group all agrees to the recommendations, especially the re-training
- Communication should be consistent, easy to follow and understand

Policy
- Mandating master contract may result in some pushback: we can't mandate stuff if we can't use it, sometimes this can cause the University to lose money if these services are needed for events and are not set up correctly, It must be set up as mandating with exceptions
- Would like more training on the use of master contracts
- Nice to use more University-specific contracts
5 - Purchase Methods Not Requiring a Solicitation

- Like more detail on how do we decide to do a master contract with? Purchasing looks into this on a regular basis and looks at spend

Systems
- Group all agrees to the recommendations

Missed issues
- Get rid of the justification process on sole sources (or revisit questions on the justification form) so they get better responses
Chapter 15: Recommendations for Improvements

Within the process “Purchase Methods Not Requiring a Solicitation”, 12 recommendations have been identified for improvement. Five different categories were identified for the improvements, and each improvement received a level of implementation. The categories include: State regulatory, Forms Automation, Communication/Training, Policy, and Systems.

There are two levels of implementation: “Short-term” indicates improvements suggested for the current system and process prior to the development of an RFP, and “Long-term” indicates improvement to the process with an RFP for a new system, or that require legislative changes or long-term commitments. The recommendations are in efforts to make the “Purchase Methods Not Requiring a Solicitation” process better and more efficiently, and help the University Department Users understand the process.

<table>
<thead>
<tr>
<th>Number</th>
<th>Describe Potential Solutions</th>
<th>Category</th>
<th>Implementation Level</th>
<th>Related Issue(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td><strong>Increase threshold for “Small Purchase P&amp;A” from $20k to match $80k threshold of “Small Purchase”</strong>&lt;br&gt;<strong>&lt;br&gt;We are recommending a working group be formed to evaluate the bid threshold and limited duration of “Small Purchase P&amp;A” contracts to match the “Small Purchase” threshold of $80k.</strong>&lt;br&gt;The value being added is to improve the efficiencies of making a “Small Purchase P&amp;A”.&lt;br&gt;Recommended tasks will be completed by the working group should include:&lt;br&gt;1) Develop a sound business case to recommend to the CPO to raise the lower threshold;&lt;br&gt;2) Increase the small P&amp;A threshold to match the $80k threshold for general Small Purchases**&lt;br&gt;Recommended working group: Procurement, Procurement rep from all three Universities, University department users, legal counsel, IPHEC director (to represent all other state universities)&lt;br&gt;Things to consider:&lt;br&gt;• Support from the University System President&lt;br&gt;• OBFS data analyst of past purchases of under and above the thresholds</td>
<td>State Regulatory</td>
<td>Long term</td>
<td>C1.7, C1.8</td>
</tr>
<tr>
<td>2</td>
<td><strong>Remove or delay registration requirement for Secretary of State/Board of Elections</strong>&lt;br&gt;We are recommending a working group be formed to evaluate the registration requirements for University System Vendors and allow the registration process to happen after Vendor selection; and reconcile the Chief Procurement Officer rules with the Secretary of State and Board of Elections rules</td>
<td>State Regulatory</td>
<td>Long term</td>
<td>C1.11</td>
</tr>
</tbody>
</table>
### Purchase Methods Not Requiring a Solicitation

<table>
<thead>
<tr>
<th>Number</th>
<th>Describe Potential Solutions</th>
<th>Category</th>
<th>Implementation Level</th>
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</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>The value being added is potential cost savings to the University System through more participation of Vendors. Today many Vendors will not submit quotes since they refuse to complete the registration process prior to being awarded the contract. It would allow the University System to receive more Vendor proposals and increase competition for the award. This would be particularly impactful once the State requirement for more than one quote per purchase is enforced.</td>
<td></td>
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<tr>
<td></td>
<td>Recommended tasks for the working group would be to develop a sound business case and recommend to the State legislature to remove or delay those registration requirements.</td>
<td></td>
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<td></td>
</tr>
<tr>
<td></td>
<td>Recommended working group: Procurement, Procurement rep from all three Universities, University Department users, Legal Counsel, IPHEC director (to represent all other state universities)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Things to consider:</td>
<td></td>
<td></td>
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</tr>
<tr>
<td></td>
<td>• Potential for Vendor participation in the case study process to illustrate Vendors that will not bid due to the requirement</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>3</td>
<td><strong>Remove Chief Procurement Officer from the Procurement Bulletin Workflow for Sole Source</strong></td>
<td>State Regulatory</td>
<td>Short Term</td>
<td>C1.1,C1.2,C1.3,C1.4,C1.5,C1.6,</td>
</tr>
<tr>
<td></td>
<td>We are recommending the evaluation of the current process where the SPO and CPO both have to approve the posting of a Sole Source to the Procurement Bulletin.</td>
<td></td>
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</tr>
<tr>
<td></td>
<td>The process today causes delays when the CPO Designate forgets to approve the posting.</td>
<td></td>
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</tr>
<tr>
<td></td>
<td>Recommended working group: CPO, Sole Source SPO, Bulletin workflow staff</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Things to consider:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Evaluation of effort needed to implement change in the Bulletin process flow</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Pros:</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Bulletin process would be streamlined</td>
<td></td>
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</tr>
<tr>
<td></td>
<td>• CPO will benefit by reducing errors when the CPO forgets to approve Sole Source postings</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Cons:</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Time spent in changing the Bulletin workflow</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## 5 Purchase Methods Not Requiring a Solicitation

<table>
<thead>
<tr>
<th>Number</th>
<th>Describe Potential Solutions</th>
<th>Category</th>
<th>Implementation Level</th>
<th>Related Issue(s)</th>
</tr>
</thead>
</table>
| 4      | **Create/Update paper forms to electronic version**  
We are recommending a working group be formed to change all paper forms within the process to an electronic version. This would offer the ability to track changes, submit, and route to the SPO, and allow them to edit and use of digital signatures on these forms.  
The value being added is to streamline the evaluation and review process, track who made changes, and cost and time savings for labor.  
Recommended tasks will be completed by the working group should include reviewing all paper forms in the process and work with BSS Forms Specialist to convert to an electronic version and test the track changes and routing function of each form.  
Recommended working group: Bulletin staff, Purchasing, Purchasing rep from each University.  
Things to consider:  
- Schedule of other Bulletin projects  
- This should include the Sole Source Justification Form (SSJF) and the Emergency Affidavit, Emergency Extension & Change order forms | Form Automation | Short Term       | C2.1, C2.2          |
| 5      | **Evaluate the use of Illinois Procurement Gateway “Form A” or “Form B” for Financial Disclosures/Conflict of Interest and Vendor certifications**  
We are recommending a working group be formed to evaluate the use of the IPG Form A or Form B to replace the University’s current use of “Exhibit A” and “Exhibit B” for Financial Disclosures/Conflict of Interest and Vendor certifications.  
The value being added is to streamline the evaluation and review process, maintain consistency with State forms, and cost and time savings for labor.  
Recommended tasks will be completed by the working group would include reviewing the IPG forms for use by the University System, and allow Vendors to electronically complete and submit the form to the Buyer. The group would also evaluate whether the forms need to be attached to the contract if the Vendor registration is already stored in IPG.  
Recommended working group: Purchasing, Purchasing rep from each University, SPO | Form Automation | Short Term       | C2.1, C2.2          |
## 5 - Purchase Methods Not Requiring a Solicitation

<table>
<thead>
<tr>
<th>Number</th>
<th>Describe Potential Solutions</th>
<th>Category</th>
<th>Implementation Level</th>
<th>Related Issue(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>6</td>
<td><strong>Retrain University Departments on these purchasing methods</strong></td>
<td>Communicatin/ Training</td>
<td>Short and Long Term</td>
<td>C3.6</td>
</tr>
</tbody>
</table>
|        | We are recommending a working group be formed to develop consistent training for University departments. University departments would have the knowledge and understanding of the process and which purchasing method to follow when submitting a purchasing requisition. The value being added is to reduce time and costs by eliminating rework. It would also give University Departments insight as to what the requirements are to submit a requisition for each purchasing type. Recommended tasks will be completed by the working group would be to create and implement a consistent training program for University departments including updated job aids, and creation of a webinar that is available on the OBFS website. Recommended working group: Purchasing, BSS training team, BSS IT resource to update website, University Department Users. Project level recommendation – Short term: create the program and Long term: Implement/maintain the program. Things to consider:  
  - Create a consistent pilot group to review training and include members of each University  
  - Maintaining training materials and training of new staff |                      |                    |                    |                  |
<p>| 7      | <strong>Communicate benefits of strategic awards and available consortia to University Departments</strong> | Communicatin/ Training | Short Term          | C3.4, C3.6       |
|        | We are recommending a working group be formed to make University Departments aware of the benefits of utilization of using approved Vendors. The value being added is to reduce time and costs on the University Departments and procurement staff by selecting approved Vendor(s) that have already had contracts negotiated and can now be used as a Purchase Method Not Requiring Solicitation. This will benefit the department when they want to do a small dollar contract off a master contract and all they have to do is a requisition and does not have to go through other procurement processes. Recommended tasks will be completed by the working group would be to create a list of benefits that is easily navigated and accessed by the University Departments, sorted by product category, and develop a communications plan. Recommended working group: Purchasing, BSS resource, Strategic procurement, IPHEC director, end users. Things to consider |                      |                    |                    |                  |</p>
<table>
<thead>
<tr>
<th>Number</th>
<th>Describe Potential Solutions</th>
<th>Category</th>
<th>Implementation Level</th>
<th>Related Issue(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>8</td>
<td><strong>Improve OBFS website</strong>&lt;br&gt;We are recommending a working group be formed to improve the OBFS website and create a clean, clear and intuitive webpage that can easily be navigated by anyone and have a robust search component, including a “How-to” section.&lt;br&gt;The value being added is to reduce time and costs on the university unit and procurement staff during research and better organized site with examples&lt;br&gt;Recommended tasks will be completed by the working group must include completely restructuring and organizing the entire OBFS website&lt;br&gt;Recommended working group: Purchasing, BSS resource, Strategic procurement, Diversity procurement, department users, AITS, payables</td>
<td>Communication Training</td>
<td>Long Term</td>
<td>C3.1-C3.6</td>
</tr>
<tr>
<td>9</td>
<td><strong>Pull spend analysis of goods and services and determine if a Master Contract is needed</strong>&lt;br&gt;We are recommending a working group be formed to analyze the spending done on commodities and determine if more Master Contracts are needed. This would help reduce costs and improve efficiencies in purchasing common items and would allow University Departments to utilize these Purchase Methods Not Requiring Solicitation with no additional work by the Procurement Staff. It would also potentially highlight areas where “stringing” (creating multiple requisitions under the Small Purchase threshold that cumulatively total more than the Small Purchase threshold) might occur.&lt;br&gt;We would also recommend this be maintained long-term through the creation of a unit within the University System that would capture and analyze spending across all aspects of the University System.&lt;br&gt;Recommended working group: Procurement Staff, IPHEC Director, Purchasing Directors at IPHEC schools&lt;br&gt;Things to consider:&lt;br&gt;• Have to pull spend analytics from multiple sources&lt;br&gt;Pros:&lt;br&gt;• Needed to make determination of other areas for Master Contracts</td>
<td>Policy</td>
<td>Short Term and Long Term</td>
<td>C4.1</td>
</tr>
</tbody>
</table>
### Mandating use of Master Contracts

We are recommending a working group be formed to create policies that mandate the use of Master Contracts when they are available. This will benefit the University System through the consolidation of our purchasing power with our Vendors and reduce total spending. It will also streamline the processing of those requisitions and result in the obtainment of the good or service in a faster time since the negotiations have already occurred.

**Recommended working group:** Procurement staff, BSS Policy & Procedure team.

**Things to consider:**

- Administrative costs not factored in when a University Department finds a good or service at a lower price than a Master Contract price.
- Have the ability to term/inactivate active Vendors in Banner

**Pros:**

- We will be able to negotiate better pricing if we consolidate the purchases/spend. Needed education as to the overall costs to the University System
- Would force University departments to select awarded Vendors

**Cons:**

- Needed education as to the overall costs to the University System
- Pushback from University Departments
### 5 Purchase Methods Not Requiring a Solicitation

<table>
<thead>
<tr>
<th>Number</th>
<th>Describe Potential Solutions</th>
<th>Category</th>
<th>Implementation Level</th>
<th>Related Issue(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>This allows University Department users the ability to know where their requisition resides if they are needing an update, without contacting University Procurement office.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Recommended working group: AITS Banner experts, BSS iBuy support, Procurement office support, University Department User</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Things to consider:</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Time and costs spent in making the change</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Pros:</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Reduces time spent by University Procurement in fielding questions as to the status of a Requisition</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Cons:</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• May be wasted effort if we replace Banner and/or iBuy</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td><strong>Ability to return Requisition in Banner to the originator</strong></td>
<td>Systems</td>
<td>Short Term</td>
<td>C6.1-C6.6</td>
</tr>
<tr>
<td></td>
<td>We are recommending a working group be formed to evaluate the changes necessary in Banner to allow for a Requisition to be returned to the originator.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>This will eliminate several steps when an Originator wants to cancel a requisition. It will also match the capabilities in Banner that we currently have in iBuy.</td>
<td></td>
<td></td>
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</tr>
<tr>
<td></td>
<td>Recommended working group: AITS Banner experts, Procurement office support, BSS Production Support</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Things to consider:</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Time and costs spent in making the change</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Pros:</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Will save time when a University Department wants to cancel a requisition</td>
<td></td>
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<td></td>
</tr>
<tr>
<td></td>
<td><strong>Cons:</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• May be wasted effort if we replace Banner and/or iBuy</td>
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</tr>
</tbody>
</table>
Chapter 16: Solutions Prioritization Matrix

The recommendation for improvements were reviewed and the potential solutions were prioritized by the Director Council. The below matrix contains the potential solutions and each ranked score.

### Solution Prioritization Matrix:
Purchase Methods Not Requiring Solicitation

<table>
<thead>
<tr>
<th>Describe Potential Solutions</th>
<th>Ease of Implementation</th>
<th>Permanence of the Solution</th>
<th>Impact of the Solution</th>
<th>Cost of the Solution</th>
<th>Total Score (Average of the total product from each participant):</th>
<th>Ranking</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create/Update paper forms to electronic version</td>
<td>2.22</td>
<td>4.00</td>
<td>3.22</td>
<td>2.89</td>
<td>108.44</td>
<td>5</td>
</tr>
<tr>
<td>Remove CPO from the Procurement Bulletin Workflow for Sole Source</td>
<td>2.67</td>
<td>3.78</td>
<td>2.89</td>
<td>3.56</td>
<td>98.56</td>
<td>7</td>
</tr>
<tr>
<td>Evaluate the use of Illinois Procurement Gateway “Form A” or “Form B” for Financial Disclosures/Conflict of Interest and Vendor certifications</td>
<td>3.00</td>
<td>3.33</td>
<td>3.00</td>
<td>3.11</td>
<td>103.67</td>
<td>6</td>
</tr>
<tr>
<td>Task</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
<td>6</td>
</tr>
<tr>
<td>----------------------------------------------------------------------</td>
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</tr>
<tr>
<td>Retrain University Departments on these purchasing methods (Short term: create the program)</td>
<td>3.67</td>
<td>3.67</td>
<td>3.89</td>
<td>3.22</td>
<td>205.56</td>
<td>2</td>
</tr>
<tr>
<td>Communicate benefits of strategic awards and available consortia to University Departments</td>
<td>4.33</td>
<td>3.89</td>
<td>3.78</td>
<td>4.00</td>
<td>265.11</td>
<td>1</td>
</tr>
<tr>
<td>Pull spend analysis of goods and services and determine if a Master Contract is needed</td>
<td>3.00</td>
<td>3.67</td>
<td>3.11</td>
<td>4.00</td>
<td>136.00</td>
<td>4</td>
</tr>
<tr>
<td>Mandating use of Master Contracts</td>
<td>2.33</td>
<td>3.56</td>
<td>3.89</td>
<td>3.56</td>
<td>141.89</td>
<td>3</td>
</tr>
<tr>
<td>Workflow and status – Ability to see where requisition resides in entire process</td>
<td>1.67</td>
<td>3.22</td>
<td>3.00</td>
<td>1.89</td>
<td>30.44</td>
<td>9</td>
</tr>
<tr>
<td>Ability to return Requisition in Banner to the originator</td>
<td>2.44</td>
<td>3.78</td>
<td>3.11</td>
<td>2.22</td>
<td>89.67</td>
<td>8</td>
</tr>
</tbody>
</table>
Chapter 17: Future State Requirements

This is a comprehensive list of functional requirements and technical requirements for the future state of the Purchase Methods Not Requiring Solicitation process. Excluded from this list are any requirements for functionality outside of the scope of this specific process, as those will be handled in a different report. Requirements regarding security, accessibility, and any overall requirement that applies to the entire system will also be addressed separately.

Attachments and Electronic forms

- Ability to create, submit, and edit electronic forms and data such as:
  - Emergency Affidavit
  - SSJF
  - Emergency extension
  - Change order form
  - State of Illinois forms
  - Vendor quotes

Policy

- Ability to set up, maintain and edit business rules and exceptions around policy and have the system enforce them
- Ability to update amounts, thresholds and business rules based on updates to policy

Training

- Selected system must offer training around each one of the purchase types and process flows

Systems

- Ability for the system to automatically post an award and change status based on business rules
- Ability to send out a reminder for actions required on a requisition
- Ability to establish workflow rules and requirements to automate steps based on purchase type
- Ability to integrate with other systems of record, including Vendor and contract systems
- Ability to see status of requisition and where it resides in entire process
- Ability to enter and store notes pertinent to the requisition. This may include contract numbers, serial numbers, etc.
- Ability to enter Vendor contact information on requisition
- Ability for delegation of tasks
- Ability to return requisition to Originator
- Ability to identify potential areas of “stringing” (making several small-dollar purchase to same Vendor that are each under the purchase thresholds, but cumulatively are over the small purchase threshold.)

Reporting and Analyzing

- Ability to track and analyze spend of commodities and determine if a Master Contract is needed
Chapter 18: Subject Matter Expert Team

The following individuals participated on the Subject Matter Expert Team of the BPI Purchase Methods Not Requiring a Solicitation project:

<table>
<thead>
<tr>
<th>Name</th>
<th>University/Department</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Melissa Plotner</td>
<td>UIUC University Payables</td>
<td>Asst Dir Payment Ops</td>
</tr>
<tr>
<td>Jay Simpson</td>
<td>UIUC Purchasing</td>
<td>Senior Contract Coordinator</td>
</tr>
<tr>
<td>Jodi Wright</td>
<td>UIUC Business Solutions and Support</td>
<td>Sr App Spec</td>
</tr>
<tr>
<td>John Meehan</td>
<td>UIC Purchasing</td>
<td>Visiting Assistant Director of Purchasing</td>
</tr>
<tr>
<td>Daniel Szajna</td>
<td>AVP Procurement Services</td>
<td>Assoc Dir Compl Policy Confl</td>
</tr>
<tr>
<td>Dale Morrison (invited but did not attend)</td>
<td>OBFS-Procurement Diversity</td>
<td>Supplier Diversity Coord</td>
</tr>
</tbody>
</table>
Chapter 19: University Focus Group Participants

The following list of individuals participated in a University Focus Group meeting either during the current state and/or the future state of the BPI Purchase Methods Not Requiring a Solicitation project.

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>University</th>
<th>Department</th>
<th>Job Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Magda</td>
<td>Aldana</td>
<td>UIC</td>
<td>University Library</td>
<td>Account Tech II</td>
</tr>
<tr>
<td>Jim</td>
<td>Fricke</td>
<td>UIC</td>
<td>CAS Finance</td>
<td>Asst. Director</td>
</tr>
<tr>
<td>Denise</td>
<td>Lee</td>
<td>UIC</td>
<td>College of Applied Health Sciences</td>
<td>Office Administrator</td>
</tr>
<tr>
<td>Jessica</td>
<td>Salgado</td>
<td>UIC</td>
<td>Biologic Resources Laboratory</td>
<td>Office Support Specialist</td>
</tr>
<tr>
<td>Daniel</td>
<td>Williams</td>
<td>UIC</td>
<td>Student Affairs</td>
<td></td>
</tr>
<tr>
<td>Lynette</td>
<td>Riddle</td>
<td>UIS</td>
<td>Facilities</td>
<td>Acct Tech II</td>
</tr>
<tr>
<td>Denise</td>
<td>Rothenbach</td>
<td>UIS</td>
<td>Department of Residence Life</td>
<td>BAA</td>
</tr>
<tr>
<td>Penny</td>
<td>Benner</td>
<td>UIUC</td>
<td>Div. of Animal Resources</td>
<td>Bus Operations Coordinator</td>
</tr>
<tr>
<td>Elizabeth</td>
<td>Clawson</td>
<td>UIUC</td>
<td>Applied Health Science</td>
<td>Director of Budget Operations</td>
</tr>
<tr>
<td>Beverly</td>
<td>Curtis</td>
<td>UIUC</td>
<td>Electrical and Computer Engineering</td>
<td>Business Manager</td>
</tr>
<tr>
<td>Cindy</td>
<td>Dillman</td>
<td>UIUC</td>
<td>Veterinary Medicine</td>
<td>Director</td>
</tr>
<tr>
<td>Julie</td>
<td>Dyar</td>
<td>UIUC</td>
<td>IL Sustainable Tech</td>
<td>Administrative Aide</td>
</tr>
<tr>
<td>Jason</td>
<td>McArthur</td>
<td>UIUC</td>
<td>Technology Services</td>
<td>ST IT Procurement Analyst</td>
</tr>
<tr>
<td>Mary Kay</td>
<td>McCallen</td>
<td>UIUC</td>
<td>LER</td>
<td>Director of Budget</td>
</tr>
<tr>
<td>Karen</td>
<td>Meyers</td>
<td>UIUC</td>
<td>Business Graduate Programs</td>
<td>Administrative Assistant</td>
</tr>
<tr>
<td>Emily</td>
<td>Volk</td>
<td>UIUC</td>
<td>Housing</td>
<td>Accounting Associate</td>
</tr>
<tr>
<td>Maile</td>
<td>Reynolds</td>
<td>UIUC</td>
<td>EBSC</td>
<td>Account Tech II</td>
</tr>
<tr>
<td>Myra</td>
<td>Sully</td>
<td>UIUC</td>
<td>Animal Sciences</td>
<td>Accounting Associate</td>
</tr>
</tbody>
</table>
Appendix A: Business Glossary

Categories of Professional & Artistic
- Law
- Acct
- Dentistry
- Medicine
- Psych
- Custom produced art

SSJF
Sole Source Justification Form

PPB
Procurement Policy Board

SPO
State Purchasing Officer

CPO
Chief Purchasing Officer

PCM
Procurement Compliance Monitor

EEC
Executive Ethics Commission

IPG
Illinois Procurement Gateway

SAMS
Systems Award Management https://www.sam.gov/portal/SAM/#1

Site contact
Role within the bulletin that reviews and submits bulletin intents and awards from the buyer

Sole Source or SS
Only one person or company that can provide the contractual services needed

Sole Economically Feasible Source or SEFS
Permissible when only one supplier is deemed economically feasible.