

# 06-Purchase Methods Requiring Solicitation

January-March 2017



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## Overview

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When a University System Department has completed their research and identified the need for a good or service that does requires a competitive solicitation, they communicate those requirements through the Requisition process that conforms to the expectations of University Purchasing. These include: Invitation for Bid, Request for Proposal, and Professional and Artistic Request for Proposal.

Once the requisition is submitted by the University Department to University Purchasing, or a need is identified by the University System, Purchasing will review and verify the request and its supporting documents and develop all the necessary materials to support the request and complete the analysis. These purchase types are posted on the Illinois Procurement Bulletin, Public Institutions for Higher Education.

Illinois Mandate Symbol -



University Policy Symbol -



Professional Mandate Symbol -



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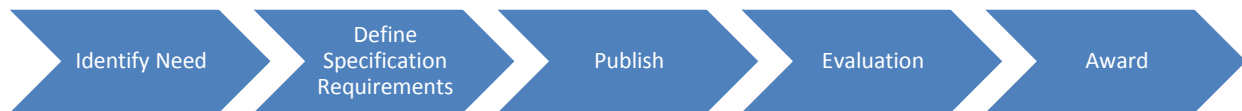
## Process Executive Summary

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### Business Process

This process encompasses the activities necessary to complete a purchasing decision that requires solicitation. It is a highly regulated process due to State mandates, and has extensive involvement of the State of Illinois Chief Procurement Office and their State Procurement Officers assigned to each University and Strategic Procurement. Due to that, the process can be long and arduous, with much discussion and rework amongst the parties involved. There are many opportunities for streamlining and standardizing the process, but due to the intense regulatory oversight, much of that cannot be accomplished.

### Current Process Activities



### Approach

The current state process activities were mapped by the Subject Matter Expert, SME, and the project process team. A SIPOC diagram was created to capture the tasks executed by the department. The SME project team identified opportunities for improvement and brainstormed potential solutions. The current state was presented, issues were identified, and recommendations were discussed at the customer focus group meeting in the University System. The process report was presented to the Source2pay Director Council where they ranked the proposed recommendations for implementation.

### Key Findings

- RFP process takes too long
- University spends more money due to solicitation process
- State involvement lengthens and complicates process
- Lack of information on OBFS website regarding solicitation process and templates
- Inconsistent process and terminology between campuses
- Inconsistent process and terminology between SPO's
- Inability to track the progress of the request through its many steps

## **06- Purchase Methods Requiring Solicitation**

### **Improvement Recommendations**

The process team identified 44 suggested improvements. From the 44 suggested improvements, the team selected ten improvements to recommend for implementation. The Director Council reviewed the ten recommendations and ranked the proposed recommendations for implementation.

Listed are the top four recommended improvements for implementation from the Director Council:

#### **#1: Make training mandatory for Unit Purchasing employees on solicitation requirements**

This would eliminate confusion on the part of the requestor, and would streamline the process for the Purchasing Department, and allow them to spend time on more value-added duties to facilitate the purchase

#### **#2: Create electronic submission system for all competitive solicitations similar to IPG website**

This will allow for the inclusion of all technical and pricing specifications that have been uploaded to a central site and also provide a validation against the IPG website.

#### **#3: Standardize terminology, procedures, and forms between Purchasing and all University System Departments**

This would create consensus amongst all participants in the procurement process and recommend the adoption of current industry standards, such as the NIGP.

#### **#4: Create one comprehensive University Systems Purchasing website for solicitations**

This would help guide Users in the creation of solicitations, with a reduction in the amount of time and effort spent by all parties.

## Chapter 1: SIPOC Diagram

Process Name	Date
Purchase Methods Requiring Solicitation	January 10, 2017

SUPPLIERS	INPUTS	PROCESS	OUTPUTS	CUSTOMERS
<u>Who</u> provides input to the process	<u>What</u> goes into the process	<u>How</u> the inputs are transformed to outputs	<u>What</u> comes out of the process	<u>Who</u> received the outputs of the process
University System Departments (Requisitioner)  Procurement Buyer  Procurement Director  State of Illinois/SPO, CPO, PPB, PCM, EEC (see Glossary for definitions)  Respondent  University Chief Legal Council  Board of Trustees (BOT)	State Solicitation Template  Solicitation Information Form (UIC)/Competitive Solicitation Form (UIUC, UIS)  Requisition  Previous Solicitation  Respondent Evaluation Forms and Matrix  Solicitation Modifications  Best and Final Offer	Identify Need  Develop Specifications and Requirements  Publish  Evaluation  Award	Solicitation  Determination Memo/Award Recommendation  Proposals/Respondent Responses  PPB Waiver  Bulletin Posting  Established Business Enterprise Program goal or BEP Goal Exception  Documentation of Good Faith Effort and/or Letter of Intent	University System Departments  Respondent  Purchasing  State of Illinois  General Public  IPHEC  Strategic Procurement  Office of Procurement Diversity



## 06- Purchase Methods Requiring Solicitation

SUPPLIERS	INPUTS	PROCESS	OUTPUTS	CUSTOMERS
<b><u>Who</u></b> provides input to the process	<b><u>What</u></b> goes into the process	<b><u>How</u></b> the inputs are transformed to outputs	<b><u>What</u></b> comes out of the process	<b><u>Who</u></b> received the outputs of the process
Risk Management	Reference Forms			
Office of Procurement Diversity	Respondent Qualifications			
	Business Enterprise Program Forms			
	Specification Documents			
	Research documentation			

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## Chapter 2: Suppliers

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### 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

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### 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

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### 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 solicitation for review

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### 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 and something is posted to IPHE Bulletin

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### Respondent

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

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### 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

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### 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 of 1 million dollars or higher.

When they care: Each time a good or service is purchased by the University System.

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## **Risk Management**

What they care about: Managing risk for expenditures

When they care: Each time a Respondent does not supply a certificate of insurance when required or provides a certificate that does not meet the insurance limits set.

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## **Office of Procurement Diversity**

What they care about: Continuing the economic development of minority, females, persons with disabilities and veteran owned businesses and providing the opportunity to participate in the State's procurement process as both prime and subcontractors.

When they care: Each time a good or service is purchased by the University System

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## **Strategic Procurement**

What they care about: Obtaining the correct goods or service as required by the University System within legal guidelines and compliant with the procurement code and policies.

When they care: Each time they are presented a need by the University System

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## **Business Rules**

None noted

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## Chapter 3: Inputs

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### State Solicitation Template

- Form created by the State of Illinois to be used for solicitations

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### Solicitation Information Form (UIC)/ Competitive Solicitation Request Form (UIUC)

- Forms created by the University of Illinois System for use at two of the three Universities

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### Requisition

- Completed purchase requisition created from Banner or iBuy

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### Previous Solicitation

- Contents of the previous solicitation, if one had been created for a similar purchase request

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### Respondent Evaluation Forms and Matrix

- Criteria used to compare the various proposals submitted by respondents. This is done to create an objective evaluation of the proposals which have been submitted.

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### Solicitation Modifications

- Changes to the original specifications or additional information provided after the solicitation was initially posted. May include clarifications for the Respondent and/or additional questions that have been asked by other Respondents

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### Best and Final Offer

- Documentation from the Respondent that includes the final pricing and bottom-line terms and conditions for which they can supply the good or service

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### Reference Forms

- References requested from the Respondent

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### Respondent qualifications

- Documentation of the respondent qualifications as it applies to the competitive solicitation being submitted, and whether they are responsive and/or responsible

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## Business Enterprise Program Forms

- Documentation from respondent that clearly demonstrates that the respondent has met the entire contract BEP goal, made good faith efforts towards meeting all or part of the goal, or requested a waiver.

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## Specification Documents

- Criteria that must be met to complete the purchase of goods or service

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## Research documentation

- Documentation of the research completed in developing the Request for Proposal or Bid

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## Business Rules

UIUC-Requisition must have the Competitive Solicitation Request Form attached 

UIC- Requisition must have the Solicitation Information Form attached 

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## Chapter 4: Process

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### Identify Need

University System determines a need for a solicitation through a request from a University Systems Department, or through analysis by Strategic Procurement

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### Develop Specifications and Requirements

University Systems Department and/or University System Subject Matter Experts are consulted and the specifications and requirements are formulated and documented for the purchase

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### Publish

State-mandated posting of the proposed purchase is made to the Procurement Bulletin to solicit responses to the desired purchase

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### Evaluate

Responses to the solicitation are evaluated and a determination is made as to whether any will meet the criteria set forth in the specifications.

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### Award

Determination is made and decision is posted and published to the Bulletin which is accessible to all Respondents and the general public.

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### Business Rules

OBFS Policy & Procedures Section 7.2.1 

30 ILCS 500: Illinois Procurement Code 

44 ILAC 4: Illinois Administrative Code for Higher Education 

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## Chapter 5: Outputs

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### Solicitation

Formal document containing the requirements and specifications for the desired good or service

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### Determination Memo/Award Recommendation

Document created by University System Department, University Purchasing, or Strategic Procurement summarizing the evaluation scores and recommending a Respondent for award, or no award.

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### Proposals/Respondent Responses

Proposals received from Respondents for meeting the needs of the bid or Request For Proposal

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### PPB Waiver

Pursuant to Section 5-30 of the Illinois Procurement Code, no contract procured above the small purchase limit may be executed until 30 days after notice of its award or letting appears in the Procurement Bulletin, without the Procurement Policy Board having the opportunity to review the proposed contract. The contracting agency may request, and the Board may agree to waive the 30-day period as necessary.

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### Bulletin Posting

Communication of the intent to purchase that is made through the Procurement Bulletin. This includes all facets of the posting (initial solicitation, modifications or amendments, and the final determination of Award, if made).

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### Established Business Enterprise Program (BEP) goal or BEP Goal exception

Pursuant to the Business Enterprise Act (30 ILCS 575) not less than 20% of the total dollar amount of State contracts, shall be established as an aspirational goal to be awarded to businesses owned by minorities, females, and persons with disabilities. OPD assesses bid/proposals on a contract by contract bases and assigns goals based on the availability of certified vendors and the scope of work.

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### Business Rules

OBFS Policy & Procedures Section 7.2.1 

30 ILCS 500: Illinois Procurement Code 

## **06- Purchase Methods Requiring Solicitation**

44 ILAC 4: Illinois Administrative Code for Higher Education





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## Chapter 6: Customers

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### University System Departments

What they want: Prompt action on the requisition request

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### Respondent

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

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### Purchasing

What they want: Completed requisition with all necessary documentation to support the request.

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### State of Illinois

What they want: Adherence to all State purchasing laws, regulations, rules, and guidelines

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### General Public

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

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### IPHEC

What they want: Access to additional purchasing opportunities

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### Strategic Procurement

What they want: Buy-in from Procurement Services and contribution from all three Universities in the University of Illinois System in order to post the best possible solicitation which will provide an award that meets and exceeds all expectations of the end-users while achieving the lowest total cost over the lifetime of the award.


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### Office of Procurement Diversity


What they want: Compliance to the usage of the diverse Vendor(s), as stated in the letter of intent

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## Business Rules

OBFS Policy & Procedures Section 7.2.1 

30 ILCS 500: Illinois Procurement Code 

44 ILAC 4: Illinois Administrative Code for Higher Education 

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## Chapter 7: Customer - Oversight Roles

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### Board of Trustees/Audit Budget Finance and Facilities

What they want: Notifications of any purchases \$1 million or over so that they can monitor adherence to all Federal and State laws and University Policy, and meet diversity goals.

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### University Chief Legal Counsel

What they want: Compliance with all laws, rules and procedures

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### Procurement Director

What they want: Expectation that Buyer will provide knowledge into the competitive solicitation process that will lead to timely award

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### State of Illinois

What they want: Compliance with State laws, Procurement Code, and the Administrative Rules

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### Office of Business and Financial Services

What they want: Compliance with OBFS policies and procedures governing procurement

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### Office of Procurement Diversity

What they want: Compliance with OBFS policies and procedures governing procurement

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### Business Rules

None noted

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## Chapter 8: Questionnaire for Current State Analysis

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**1. Why does the process exist?**

- Exists to comply with the State Procurement Code and Administrative Rules for higher education

**2. What is the purpose of the process?**

- Promote open and fair competition to meet the needs of the University
- A consistent process that advertises procurement opportunities in order to promote open and fair competition to obtain the best value for the University System.

**3. What are the process boundaries (i.e., when does it start and end?)**

- Starts when either a Requisition when conditions are met for a competitive solicitation (defined as greater than \$80,000 for general goods and services, or greater than or equal to \$20,000 for Professional and Artistic) is received by Purchasing, or Strategic Procurement identifies the need for a solicitation. This process is followed if there is not an exception, exemption or an existing contract.
- Ends when the State authority to purchase the item is granted (award published, PPB waived)

**4. What are the major activities/steps in the process?**

See [Chapter 4: Process](#) (Ctrl-click to follow link)

**5. What is the expected outcome or output of the process?**

See [Chapter 5: Outputs](#) (Ctrl-click to follow link)

**6. Who uses the output of the process, and why?**

See [Chapter 6: Customers](#) (Ctrl-click to follow link)

**7. Who benefits from the process, and how?**

- University System and Illinois taxpayers benefit as a competitive solicitation should result in the best value to be spent in the obtainment of the good or service.

**8. What information is necessary for the process?**

See [Chapter 3: Inputs](#) (Ctrl-click to follow link)

**9. Where does that information come from?**

See [Chapter 2: Suppliers](#) (Ctrl-click to follow link)

**10. What effect does that information have on the process and output?**

- It focuses the search which results in the best possible outcome

**11. Who is primarily responsible for the process?**

- Purchasing and Strategic Procurement

**12. What other units/organizations participate in or support the process?**

- Board of Trustees
- Legal
- Office of Procurement Diversity
- Risk Management
- State Executive Ethics Commission
- State Procurement Office/Chief Procurement Officer/PPB
- University Units

- Vendor/Respondent

**13. What Information Technology system(s) support the process?**

- Banner
- Banner Document Management (BDM)
- Better Business Bureau
- Box.com
- Bureau of Labor and Statistics
- Central Management Services
- CMS Database for BEP use
- EDDIE
- Hoover's
- iBuy
- Illinois Contract System (ICS)
- Illinois Procurement Gateway
- IPHR
- Procurement Bulletin
- SAM website
- Secretary of State/Board of Elections

**14. What policies guide or constrain the process?**

- Procurement Code and Purchasing laws
- EEC oversight for protests
- The 44 Administration Rules Section 4.2010 Competitive Sealed Bidding, Section 4.2015 Competitive Proposals and Section 4.2035 for Competitive Selection Procedures for Professional and Artistic Services.
- OBFS policies

**15. How often does the process get executed?**

- We generated 133 bids, RFPs and P&A for FY16

**16. What are potential defects with respect to the process?**

- State oversight adds bureaucratic layer to the process that results in extra time and effort spent and often results in higher prices being paid due to the reluctance of Respondents to register with the State
- The possibility of a bid protest brought on by Respondents which were not selected
- Different requirements driven by system used (iBuy or Banner)
- Different Solicitation Request forms at each University
- Bid and RFP templates are not made available on the OBFS website
- Time required to develop specifications that satisfy the requestor, University Purchasing, and the State Procurement Officer
- Different requirements dependent on SPO assigned

## **06- Purchase Methods Requiring Solicitation**

### **a. How often do the potential defects occur?**

- At every solicitation

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

- State oversight Process takes too long
- Customer cannot buy from their preferred Vendor
- Conflicting forms and processes at each University
- Lack of templates and guidelines for process (OBFS Purchasing) and outdated forms

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

- State oversight Process takes too long
- Customer cannot buy from their preferred Vendor

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

- E-procurement receiving on-line proposals
- Not likely due to the slim chance of State reform for procurement

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## Chapter 9: Questionnaire for Potential Process Improvement Candidates

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1. **How would the process operate differently in the “Perfect Situation?”**
  - No State oversight resulting in few or no mandatory registration requirements
  - Consistent, repeatable, faster, more efficient, transparent process
2. **What does the team hope to achieve through this improvement?**
  - More engagement from the University Department participants within the process
  - More qualified and diverse Vendor responses to solicitation requests
  - Consistency between the University processes
  - Better competition resulting in lower prices for goods and services
3. **Who would benefit from the desired improvement to the process?**
  - All participants would see a faster, more understandable process
- 3a. **How would we know?**
  - Shorter time to complete the process
  - Higher University Department and Vendor satisfaction
  - More qualified and diverse participation from Vendors
4. **What data can be provided with respect to the process performance (e.g. service rating, cycle time, customer survey responses, etc.)?**
  - Time to complete the process
    - SPO involvement
    - Quantify number of revisions required to get an approved Solicitation
    - “Requisition to PO” reports generated at the University System Department level
    - OPD turnaround time to provide Diversity goals to Purchasing
      - FY17 is currently averaging 6.5 days turnaround
    - SMEs to provide calendar-year metrics from 2016
5. **Who should be included in any improvement discussions for the process?**
  - All the Suppliers and customers from our SIPOC
    - [Chapter 2 Suppliers](#)
    - [Chapter 6 Customers](#)

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## Chapter 10: Current State Metrics

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Metrics in three areas is 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?
  - These processes can take anywhere from several months to several years, dependent on the SPO assigned
- How many touchpoints are there per process?
  - 15 touchpoints for the simplest path through the process. The most complex can have an infinite number based on several points where feedback is obtained and passed back and for amongst participants.
- How many steps are involved in each process?
  - 102 steps for each Bid
  - 142 steps for RFP and RFP P&A



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## Chapter 11: Feedback from Customer Focus Groups – Current State

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The Current State process was presented to each University's Customer Focus Group on January 24-26, 2017. A total of nine people attended with two people in attendance from UIC, two people from UIS, and five people from UIUC.

### Campus Focus Group Summary

- **Overall:**
  - Positive experiences with those in Purchasing
  - Larger departments have a centralized group that handles the process and acts as intermediary between requestors and Purchasing in building the requirements
  - RFP process takes too long
  - Rules sometimes hinder the prudent and logical use of funds

### Campus Focus Group Report

- **Overall:**
  - Positive experiences with those in Purchasing
    - Acknowledged shortage of staff leads to increased times but understand why
  - Larger departments have a centralized group that handles the process and acts as intermediary between requestors and Purchasing in building the requirements
  - RFP process takes too long
    - University spends more money due to:
      - Lack of bidders
        - Sometimes only get one bid since Vendors refuse to register
        - Have to purchase from Broker rather than going directly to Vendor in some instances, adding costs since vendor refuses to register.
      - Lack of ability to get RFP out before previous contracts expire
      - Time involve internally to work with SPO and get the RFP approved (UIUC-specifically)
      - Vendors that do bid mark up the prices to cover the hassles of doing business with the State
    - In-process RFPs that are in their 15th and 24th months
    - Lost grant funding due to delays
      - Grant specifically stated that the specific item had to be purchased, but the SPO took so long to approve that the grant expired before the purchase could be made
      - State involvement really is an obstacle
    - No understanding by the SPO for complex issues, time spent trying to educate them as to what the need is
    - Leads to dissatisfaction amongst Faculty/Primary Investigator
      - They feel they are the experts and should not be questioned as to the specific requirements of their request by someone with no knowledge of the equipment or process
    - SPO greatly oversimplifies the requirement and lends no value to the process
    - Would like more flexibility on selecting a vendor rather than just on lowest bidder

## 06- Purchase Methods Requiring Solicitation

- Regulatory relief is the key to reducing the time
- Rules sometimes hinder the prudent and logical use of funds
  - University has classifications for office equipment and classroom equipment, wanted the furniture to match, but couldn't buy furniture from the office supply person since they were not classified as classroom supplies, so spent \$100k more since we had to use two different vendors
  - Kept a bad vendor due to fear of not receiving additional Vendors to bid
    - Serology vendor was losing samples and had repeated invoicing problems, wanted to change vendors, but the RFP process takes so long, and we may end up with the same vendor at a higher price, since other vendors don't want to jump through the hoops to bid.
- **Training issues**
  - Not knowing what to do for a multiyear contracts - what steps to follow, what to do first
- **Frustrations**
  - Would like more flexibility on selecting a vendor rather than just on lowest bidder
  - Conflicts when a punch-out Vendor has goods that cost more and don't provide needed service that could be obtained by going direct to the Vendor
    - VWR resells Steris products, but since VWR is a punch-out we are supposed to use them, even though Steris is cheaper and will deliver 180 gal drums to the rooms, whereas VWR will only deliver to the dock
    - Have to justify all of this when if we could just use Steris it would simplify it
  - Focus in Purchasing was always in adding value, almost flipped that backwards, maybe because Purchasing no longer has control over solicitations
    - Why would Purchasing take the time to critique the bid or RFP up front when even if they do, the SPO will rewrite it anyway
      - Seems like purchasing now spends their time on smaller things whereas before they would devote that time and energy towards the large purchases
- **System issues**
  - Nice to have a reminder when contracts & PO are expiring, because departments forget
  - Not sure what's left on a standing order or how much we have left on a contract - like a dashboard or report, or it's a manual analysis to determine what's left
- **Issues from other processes**
  - Inconsistencies in the process dependent on the Buyer
    - Frustrations over lack of detail by Purchasing when items are sent in complete, but get rejected since they missed something in the provided information
    - Four bids submitted, all got assigned to different buyers, buyer on one of the 4 advised we had to bid it out, even though we have used the same vendors for several years running since the seed has to meet exacting specifications to minimize risk
      - Other three buyers never required this
  - Frustration over procurement rule changes where the \$80K limit is invoked on past years' purchases
  - Inability to go back and change the wrong account # on the PO in iBuy

## **06- Purchase Methods Requiring Solicitation**

- Issue in Banner, Banner only allows one vendor ID per vendor, and if a vendor is shared, it's difficult for departments to determine which invoice is for which PO, especially for standing invoice - this can cause a lot of manual effort

## Chapter 12: Opportunities for Improvements

The following opportunities for improvement were identified through team discussions, focus groups, Director Council, and OBFS Partners. Items in **BOLD** are addressed in the Recommendations in [Chapter 15](#)

Number	Communications-Issues related to providing information
C1	Communications take too long
C2	<b>Currently Bidder/Proposers are not consistent in providing Utilization Plans with all solicitations that have BEP Goals.</b>
C3	Delays in getting SPO questions answered
C4	Difficulty in scheduling times when all parties can meet (SPO, Buyer, University Department) to discuss specifications
C5	<b>OBFS policies, procedures and guidelines on website are outdated or not updated in timely fashion</b>
C6	<b>OPD is not notified when a solicitation is posted.</b>
C7	References can be hard to reach and don't always give you adequate information.
C8	<b>Seeking clarification from Vendors greatly extends the process</b>
C9	SPO absence notification
C10	Vendor complaints due to their belief that their questions are not answered to their satisfaction
C11	Vendor responses may be incorrect based on the rewording of the requirement by the SPO
C12	Vendors do not always provide all the necessary information up-front

Number	Documentation – Issues related to lack of documentation
D1	Instruction or guide for University Departments
D2	<b>State Bid and RFP templates are not provided on OBFS website to guide departments in creating specifications</b>

Number	Resources (Financial, Human) Issues related to lack of sufficient staff or funding
R1	Takes too long in Purchasing and the Department
R2	SPO/State
R3	<b>SPO approval is sometimes delayed, requiring the posting to be sent back and the document to be adjusted to meet mandated posting times.</b>

## 06- Purchase Methods Requiring Solicitation

Number	Resources (Financial, Human) Issues related to lack of sufficient staff or funding
R4	Conflicts of Interest process can delay award of contract
R5	CPO BEP utilization plan failure to complete a utilization plan or provide GFE shall render the bid or offer non responsive or non-responsible
R6	Different SPOs act differently.
R7	Different State Purchasing Officers have different requirements-How to provide documents, How to receive/provide feedback, Different language requirements, Different expectations
R8	IFB/RFP Failure to submit a Utilization Plan as instructed if required, may render the response non-responsive
R9	Inconsistencies from the SPO as to what is considered "non-responsive"
R10	Lack of competition due to many Vendors who are unwilling to meet all the rigorous State requirements
R11	Loss of grant funding due to delays
R12	Need clarity on when a multi-contract can be used
R13	Process for posting notices requires multiple approvals - timing, approval , slow or non-responsive SPO
R14	Rules sometimes hinder the prudent and logical use of funds
R15	SPOs control of the process and heavy involvement in a matter in which they have no expertise sometimes results in compromises to the Requirements just to get the SPO sign-off.
R16	SPOs need consistent process to follow
R17	State registration requirements
R18	State terms and conditions are not the same as University Terms and conditions
R19	The draft document must also be routed to the SPO for feedback.
R20	The process sometimes ends with the selection of a Vendor in which we have no confidence
R21	The SPOs can extend this process greatly
R22	Too many steps involved with posting to Bulletin due to SPO involvement
R23	Urbana SPO involvement in reviewing and formulating answers to vendor questions takes too long and in some cases this means that the opening date has to be extended
R24	Urbana SPO reviews all vendor questions and provides (or revises department/purchasing answers).
R25	Vendor mark-ups to cover registration costs

## 06- Purchase Methods Requiring Solicitation

Number	University
U1	Clarifications from Vendors extends the process
U2	Currently Diversity Compliance is not a part of the Administrative Review for responsiveness.
U3	Currently OPD does not receive all of the Utilization Plans submitted.
U4	Different process or interpretation of policies, procedures, guidelines dependent on which buyer solicitation is assigned to within the same University Purchasing office.
U5	Lack of document upload naming requirements between Procurement Units
U6	Inconsistent interpretation of terms (responsive/responsible, amendment/addendum)
U7	Inconsistent terminologies within Procurement Services for same item
U8	Inconsistent Terms
U9	Large number of people have to be involved in the process
U10	Multiple processes and forms for submission by University Department to respective Purchasing offices.
U11	OBFS Policy/procedures on web are out of date
U12	OPD is not a part of the evaluation committee.
U13	OPD is not notified when an award is published that has a BEP goal.
U14	Processes differ from University to University
U15	Respondent not providing utilization plan with solicitations with BEP goals
U16	Scheduling demos is very time consuming and can be expensive, depending on the location, duration and number of people.

Number	Technology – Issues related to system’s lack of functionality to support the process
T1	Character limits in Bulletin fields
T2	Multiple systems utilized for submission (iBuy, Banner, email)
T3	University Departments have no easy method to track the progress of the request through its many steps.
T4	No easy way to know when a PO or contract is expiring
T5	Unable to track process fully

Number	Training – Issues related to lack of understanding the process
Tr1	No easy way to know which solicitation type to use
Tr2	Inconsistent terminologies between Universities for same item

## 06- Purchase Methods Requiring Solicitation

Number	Training – Issues related to lack of understanding the process
Tr3	State bid and RFP templates not available on the web
Tr4	Lack of instruction or guide for campus units
Tr5	SPOs have less experience than most public buyers, yet they have oversight
Tr6	Multi-year contract confusion

## Chapter 13: Suggested Improvements

The following recommendations came from discussions with the process team members, Director council, and University focus groups. Not all improvements were selected by the process team. The selected improvements were present to the University focus groups for feedback, and are recommended from review by the Director Council. (Further discussed in [Chapter 15: Recommendations for Improvements](#))

Number	Change Category	Suggested Improvement
1	Communications	Update procedures and communication on OBFS website
2	Communications	Email is a wonderful tool for efficient communication and contract/bid/RFP documentation
3	Communications	Consistent information
4	Communications	OBFS policies/procedures/guidelines should be updated monthly
5	Communications	Solicitations should stipulate that the utilization plan is required
6	Communications	Include OPD in email notifications for solicitations posted and awarded with BEP goals
7	Documentation	Consensus on what forms to use, when to use them, and what language to use between purchasing units and between all University Departments
8	P&P-State/SPO	Reduce State oversight - give relief on research, medical, etc.
9	P&P-State/SPO	Reduce approval steps of SPO-Bulletin posting, approve bid doc
10	P&P-State/SPO	State CPO to provide training to SPOs on the procurement process and state compliance to provide consistency amongst documentation and procedures
11	P&P-State/SPO	Written SPO training put together to give to Universities to ensure consistency
12	P&P-State/SPO	Procurement reform
13	P&P-University	Consensus on terms and procedures for all Universities in System to follow
14	P&P-University	Determine/document/publish consistent policy for bid/RFP process
15	P&P-University	Detail process for all involved, clarify requirements
16	P&P-University	Change policy and procedure to include OPD in administrative review
17	P&P-University	After bid opening all utilization plans/letters of intent envelopes should be forwarded to OPD/emailed after opening
18	P&P-University	Create/provide Evaluation matrix template or sample
19	P&P-University	Have buyer contact and commodities for Urbana listed on the OBFS website
20	P&P-University	Remove outdated information from OBFS website
21	P&P-University	Cross-training
22	Resources	Lift the hiring freeze and fill positions
23	Technology	Use EDDIE for reporting
24	Technology	Provide more reporting functionality
25	Technology	Expand bulletin field character limits



## 06- Purchase Methods Requiring Solicitation

Number	Change Category	Suggested Improvement
26	Technology	Provide tracking similar to iCS/iBuy system
27	Technology	System to show POs with contracts/Bid/RFP #s and \$\$ spent/remaining
28	Technology	Modify/enhance IPG to only include IPG vendors
29	Technology	Create electronic submissions for all bids and RFPs, similar to IPB website
30	Technology	System that can allow for Vendor interactions to communicate and acknowledge receipt of and understanding of solicitation requirements and documentation
31	Technology	Connectivity with IPG, OPD, and other procurement systems
32	Training	Mandatory training for Unit Purchasing employees on solicitation requirements
33	Training	Specifically clarify the multi-year contract use and repetitive need as to when bid should be done
34	Training	Have the State create webinars, training on solicitation (not just BEP) for vendors
35	Training	Create a best-practice repository of successful bids/RFPs
36	Training	SPOs need to be certified on CPPB or CPPO before being a SPO
37	Training	Make SPO position requirements have more state-specific and more years of experience as job qualifications
38	Training	Standards across University system-Documents that define the competitive solicitation process
39	Training	Increased communication of available training
40	Training	Remove outdated policies, procedures, contacts, templates from OBFS website
41	Training	Put sample or locked Bid and RFP templates on OBFS website
42	Training	Create consistent glossary of terms and post on OBFS website
43	Training	Create more mediums for training on how to complete the solicitation process (open labs, webinars, etc.).
44	Training	Accessibility of training tools on OBFS website

## Chapter 14: Feedback from Customer Focus Groups – Future State

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The Future State process was presented to each University's Customer Focus Group on February 28, March 1 and March 2. A total of twelve people attended, with one person in attendance from UIC, five people from UIS, and six people from UIUC.

### Customer Focus Group Summary

- Receptive to all recommendations discussed except for required training for the processes
  - In favor of training but not that it be required
  - Concerned that the process changes so frequently and that the training would be out of date
- Strong suggestion for the adoption of industry-standard purchasing terminologies across the entire System
- Idea of removing the State from the process was warmly received, but most believed it could never happen.

### Customer Focus Group Report

Suggestions and comments grouped by the Recommendation they address

#### #1 Streamline bulletin process

- **Comments**
  - Don't really see the process but think it's a good idea

#### #2 System for electronic RFP submissions

- **Suggestions**
  - Need the ability to search through the submission documents
- **Comments**
  - Electronic submissions would increase the number of responses
  - That would be great, and thinks this will increase the amount of responses from Vendors

#### #3 Standardize terminologies across the University System

- **Suggestions**
  - Instead of the campuses coming up with terminologies, should use NIGP terminologies then people in departments could buy the copy of the book, why reinvent the wheel?
  - Feel more units should use the Bulletin and search for notices and use it as a tool - a training session for units on how to use the bulletin
  - Links to templates and samples would be nice
- **Comments**
  - UA realignment will pretty much nix this
  - I hope that happens but feels that will take 10 years to implement

**#4 Single comprehensive website for instruction**

- **Suggestions**
  - Really be nice to have a repository of previous RFPs so that we could search them and see if we are buying from the same vendor, or re-use the parts of their RFP that would be similar
  - The Bulletin contains all our solicitations
    - Maybe a training session on the bulletin, allowing someone to search through it and accomplish the same thing?

**#5 Mandatory training on solicitation requirements**

- **Suggestions**
  - Purchasing should be completing a certification training for Buyers
    - At one time all the buyers went through NIGP training, all those people have now left, need to do it again.
  - Create Checklists/Job aids and have samples of previous RFPs/IFBs for guidance
  - Mandatory training would likely have to happen way before you really need to create one
    - Maybe have a webinar refresher?
- Would be nice to use and see what other units have done to reduce re-work, or the University ends up getting 3 quotes for the same stuff
- **Comments**
  - Making it mandatory before someone can do it isn't a good idea
    - Nice to have training available but to make it mandatory would mean constant changes to the training manual due to the frequent changes, either by our Purchasing department or the State

**#6 Lobby the State to re-allow the exemption process that recently expired**

- **Comments**
  - Great suggestion

**#7 Standards for OPD involvement**

- **Comments**
  - Good as long as it doesn't delay the process or restrict competition

**#8 Display POs with \$\$ remaining**

- **Comments**
  - Many are running reports to do the same thing, but having it live in the system would be ideal

**#9 Remove the State from the process**

- **Comments**
  - Should be #1!

## 06- Purchase Methods Requiring Solicitation

### #10 Standardization amongst SPOs

- **Comments**

- None

#### **Outside the process**

- Would be beneficial to create a PO based on the contract since it's only for the method of payment

## Chapter 15: Recommendations for Improvements

Within the process 06- Purchase Methods Requiring Solicitation recommendations have been identified for improvement. 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. The recommendations are in order to make the process better, help the users understand the process, and make sure the process works.

#	Describe Potential Solutions	Category	Scope	Related Issue(s)
1	<b>Evaluate the approval steps involved when posting to the Bulletin</b>  Currently the steps to gain approval to post to the public are duplicated: once to gain approval for the document, and then again when the bulletin posting process happens. The process should be streamlined to eliminate the process that currently happens prior to the bulletin posting.	Policy and Procedure/State	Short-term	R13
2	<b>Create electronic submission system for all competitive solicitations similar to IPG website</b>  We are recommending the continuation of the project that is handling the creation of a system that would allow for the electronic submission of vendor responses. This will allow for the inclusion of all technical and pricing specifications that have been uploaded to a central site. It will also provide a validation against the IPG website. This will help eliminate the issue where bids are disallowed due to a Vendor not correctly registering with the IPG.	Technology	Short-term	C1, C2, C8, R1, R10, U1
3	<b>Standardize terminology, procedures, and forms between Purchasing and all University System Departments</b>  We recommend standardizing Procurement terminology, procedures, and forms by all Procurement Units at each University. This would create consensus amongst all participants in the procurement process and recommend the adoption of current industry standards, such as the NIGP. This will result in a more consistent, user-friendly process for the various University Departments.	Documentation	Short-term	D1, U5, U6, U7, U8, U10, U11, U14, Tr2, Tr4
4	<b>Create one comprehensive University Systems Purchasing website for solicitations</b>  This would include all current Procurement Code interpretations, Policies and Procedures, all standardized forms, templates, buyer contact information with commodities, and other sample documentation. This would include sample RFPs/IFBs for use in creating new solicitations, as well as training to educate users on searching through the Procurement Bulletin for additional examples. Maintenance needs also have to be considered, as ongoing changes to laws and procurement code would be critical to be updated as it occurs.	Technology	Short-term	C5, D1, D2, U4, U5, U6, U7, U8, U10, U11, U14, Tr2, Tr4

## 06- Purchase Methods Requiring Solicitation

#	Describe Potential Solutions	Category	Scope	Related Issue(s)
5	<p><b>Make training mandatory for Unit Purchasing employees on solicitation requirements</b></p> <p>This would include an overview of the entire process, and training specific to the requirements to develop the University Department's input. Additionally, we recommend this training be required prior to requesting a purchase that requires a solicitation. This would eliminate confusion on the part of the requestor, and would streamline the process for the Purchasing Department, and allow them to spend time on more value-added duties to facilitate the purchase.</p>	Training/Policy and Procedure	Short-term	Tr1, Tr3, Tr4, Tr6
6	<p><b>Lobby the State to re-allow the exemption process eliminated recently</b></p> <p>We are recommending the University System to lobby the State to reinstate the Procurement Code 1.13B that recently expired. We also recommend additional new exemptions to be granted based on funding source and other reasons.</p>	Policy and Procedure	Long-term	R2, R3
7	<p><b>Develop standards for the Office of Procurement Diversity's involvement in the procurement processes.</b></p> <p>We are recommending a working group be formed to determine how best to involve the Office of Procurement Diversity in the solicitation processes. Part of this evaluation would include possible remedies for when a Vendor did not provide a Utilization Plan, determination whether the Vendor can move to the next phase of the process, and if they can be considered for award.</p> <p>The recommended working group would include representatives from OPD, Strategic Procurement, and University Purchasing Units.</p>	Policy and Procedure	Short-term	C6, R5, U2, U3, U12, U15
8	<p><b>Provide method to display Purchase Orders with competitive solicitation identification numbers and dollars spent/remaining</b></p> <p>We recommend an enhancement to the current Banner system that would allow for the University System Departments to more easily report on Purchase Orders. This would include references to the competitive solicitations associated to the PO, as well as the dollars spent and remaining on the PO, and any outstanding encumbrances. This would also be functionality we want to ensure a new system would be able to accomplish.</p>	Technology	Short term	T4

## 06- Purchase Methods Requiring Solicitation

#	Describe Potential Solutions	Category	Scope	Related Issue(s)
9	<p><b>Lobby the State to relax or remove requirements for State oversight</b></p> <p>We recommend the University System lobby the State to relax or remove oversight for these procurement methods. The inclusion of the SPO in the competitive solicitation process consumes an inordinate amount of time and resources, with minimal value added. The University System could self-manage the procurement laws and rules, and result in better management of State funding through the certification of select University System personnel using the NIGP standards.</p>	Policy and Procedure	Long-term	R6, R7, R8, R9, R11, R14, R15, R16, R17, R18, R19, R20, R21, R22, R23, R24, R25, U6, U9, U13, Tr5
10	<p><b>Request standardization amongst State Purchasing Officers</b></p> <p>We recommend the University System lobby the Chief Procurement Office to standardize the documentation and procedures used across all State Procurement Officers. Each SPO must be CPPB or CPPO certified with NIGP to better understand the processes. These standards would be communicated to the University System to educate as to what criteria the SPO uses to evaluate solicitations.</p>	Policy and Procedure	Long-term	R6, R9, R16

## 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 Requiring Solicitation								
<p>There are two levels of implementation</p> <p><b>‘Short Term’ notes improvements on the current system and processes prior to the RFP for a new system</b></p> <p>‘Long Term’ notes improvement to the process with a RFP for a new system.</p>								
	Describe Potential Solutions	Category	Ease of Implementation:	Permanence of the Solution:	Impact of the Solution:	Cost of the Solution:	Total Score (Average of The total product from each participant):	Ranking
			1 (very difficult) - 5 (very easy)	1 (temporary) - 5 (permanent)	1 (low) - 5 (high)	1 (high) - 5 (low)		
			Avg of attribute from each participant)	Avg of attribute from each participant)	Avg of attribute from each participant)	Avg of attribute from each participant)		
1	Make training mandatory for Unit Purchasing employees on solicitation requirements	Training/Policy and Procedure	3.5	4.625	4.5	3.875	282.269531	1
2	Standardize terminology, procedures, and forms between Purchasing and all University System Departments	Documentation	3.25	3.625	3.75	3.25	143.583984	2
3	Create one comprehensive University Systems Purchasing website for solicitations	Technology	3	3.875	3.875	2.75	123.878906	3
4	Create electronic submissions for all bids and RFPs, similar to IPB website	Technology	2.875	4.25	4.25	2.375	123.33008	4
5	Provide method to display Purchase Orders with competitive solicitation identification numbers and dollars spent/remaining	Technology	2.375	4.125	3.875	2.125	80.6711426	5




### 06- Purchase Methods Requiring Solicitation

6	Develop standards for the Office of Procurement Diversity's involvement in the procurement processes.	Policy/Procedure	2.625	3.75	3.25	2.5	79.9804688	6
7	Evaluate the approval steps involved when posting to the Bulletin	Policy and Procedure/State	2.5	3.125	2.625	2.875	58.9599609	7

## Chapter 17: Future State Requirements

This is a comprehensive list of functional requirements and technical requirements for the future state of the Purchase Methods Requiring Solicitation process. Excluded from this list are any requirements for functionality outside of the scope of this specific process, such as security, accessibility, etc, which will be handled in a different process.

- Ability to track progress of task through procurement process
  - Ability to display the status of each request and to whom it is assigned
  - Ability to receive notifications as the task flows through the process
  - Ability to customize notification frequency based on Role and User
  - Ability to customize notification types desired to receive based on Role and User
- Ability to receive electronic bid submissions
  - Ability to set controls to restrict opening of bids until bid opening date and time
  - Ability to communicate to submitters through the system
  - Ability to designate required items, and disallow submissions that do not contain all required items
  - Please refer to the e-Bidding project for additional requirements. It is located below
  - 
  
**E-Bidding Requirements.docx**
- Ability to provide guided instruction for complex procurement matters
  - Ability to customize a “wizard” that prompts Users with questions and guides them to the appropriate policy or instruction.
- Ability to create workflows
  - Ability to customize workflow rules to allow different rules dependent on Role
- Ability to customize information displayed to the User based on Role
- Ability to generate reports based on data within the system
  - Ability to export data to a data warehouse
  - Ability to generate standardized reports as well as ad-hoc reports
- Ability to interface with other systems using industry-standard protocols
- Ability to reference to and link to forms and documentation that are created outside the system
- Ability for all Users to upload forms and documentation

## Chapter 18: Subject Matter Expert Team

The following individuals participated on the Subject Matter Expert Team of the BPI [List Process] project:

Name	University/Department	Title
DeAndre Hopkins	UIC Hospital-Pediatrics	PURCH OFFIC 1
Ingrid Worrell	UIC Purchasing	BUS/ADMINV ASSOC
Jill Menezes	UIS Purchasing	BUS/ADMINV ASSOC
Jodi Wright	OBFS BSS	SR APP SPEC
Joshua Miller	UIC Hospital-Pediatrics	SPEC RSDIS
Karen McFarlin	OBFS USFSCO	ASSOC DIR PROJ & OPS
Maria Thompson	UIUC Facilities & Services	BAA PROCUREMENT MANAGER
Megan Wells	UIUC Purchasing	BUSINESS/ADMINV ASSOCIATE
Natalie Crook	AITC	BUSINESS/ADMINV ASSOCIATE
Sharon Eddings	Strategic Procurement	SR SORC & CONTR SPEC
Susie Baker	University Payables	ASSOC DIR PAYMENT SERV
Vernell Hammons	Procurement Diversity	SUPPLIER DIV COORD

## Chapter 19: University Focus Group Participants

The following list of individual participated in a University Focus Group meeting either during the current state and/or the future state of the BPI 06- Purchase Methods Requiring Solicitation project.

Name	University/Department
Basrawi, Sabah	UIC
Benner, Penny J	UIUC
Billhymer, Jacqueline N	UIUC
Curtis, Beverly A	UIUC
Gochanour, Wendy L	UIS
Langdon, Toni L	UIS
Lile, Andrea S	UIUC
McArthur, Jason A	UIUC
Riddle, Lynette	UIS
Sully, Myra L	UIUC
Thornley, Allison M	UIS
Umbarger, Mary E	UIC

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## Appendix A: Business Glossary

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**BEP**

Business Enterprise Program

**Bidder**

Referred to as “Respondent” in the Invitation For Bid (IFB) process

**CPPB**

Certified Professional Public Buyer

**CPPO**

Certified Public Procurement Officer

**CPO**

Chief Purchasing Officer

**EEC**

Executive Ethics Commission

**EDDIE**

Reporting module used by University personnel

**GFE**

Good Faith Effort

**IFB**

Invitation For Bid

**IPG**

Illinois Procurement Gateway

**IPHR**

Illinois Program for Research in Humanities

**IPHEC**

Illinois Public Higher Education Cooperative

**Offeror**

Referred to as a “Respondent” in the Request For Proposal (RFP) process

**PPB**

Procurement Policy Board

**PCM**

Procurement Compliance Monitor

**Professional & Artistic (P&A) Categories**

- Law
- Acct
- Dentistry

## 06- Purchase Methods Requiring Solicitation

- Medicine
- Psych
- Custom produced art

### **RFP**

Request For Proposal

### **Requisition**

Documentation of all information necessary for the creation of a Purchase Order to acquire goods or services.

### **Respondent**

A Bidder in an IFP and an Offeror in an RFP

### **SAMS**

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

### **SME**

Subject Matter Expert

### **SPO**

State Purchasing Officer

### **Site contact**

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

### **Supplier**

Standard terminology used in the Business Process Analysis facilitation to identify those that provide input for the process being analyzed.