




CHIEF PROCUREMENT OFFICE

Ellen H. Daley, General Services

Notice 2024.02 General Services

To: Agency Procurement Staff
Central Management Services Bureau of Strategic Sourcing
State Purchasing Officers

From: Ellen H. Daley 

Date: September 25, 2023

Subject: Small Business Contracting

CC: Procurement Compliance Monitors
Procurement Policy Board
Commission on Equity and Inclusion

This notice is effective immediately.

Through our concerted efforts, in Fiscal Year 2022 State agencies awarded more than \$200 million to 796 small businesses in Illinois! As we start establishing the Fiscal Year 2024 small business contracting goals, I applaud you for the thoughtfulness and effort that you put in last year and every day to help Illinois' small business owners participate in State procurement.

Important Dates

Wednesday	9/27/2023	Webinar regarding this Notice
Thursday	9/28/2023	Webinar regarding this Notice
Thursday	10/5/2023	Fiscal Year 2024 Compliance Plan due
Thursday	10/5/2023	Fiscal Year 2023 Annual Report due
Thursday	10/12/2023	CPO-GS notifies agency of acceptance/rejection of Compliance Plan

Requirements of Sections 45-90 and 45-45 of the Illinois Procurement Code

Section 45-90 establishes a goal that not less than 10% of the total dollar amount of State contracts are awarded as a contract or subcontract to small businesses. Pursuant to Section 45-90 of the Procurement Code, each State official or agency shall file with the Chief Procurement Officer an annual compliance plan outlining:

- 1) the goals of the State official or agency for Fiscal Year 2024,
- 2) the manner in which the official or agency intends to reach these goals, and
- 3) a timetable for reaching these goals.

The Chief Procurement Officer for General Services (CPO-GS) shall then review and approve the plan of the State official or agency. The CPO-GS may reject any plan that does not comply with the Section. Upon approval of an agency plan by the CPO-GS, State Purchasing Officers shall work with agency procurement staff to ensure that the terms of the plan are being implemented in the solicitation and contracting process.



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Section 45-45 requires a report of contract awards that were set-aside for small business competition. Each State official or agency shall file with the CPO-GS an annual report of its utilization of small businesses during Fiscal Year 2023. The report shall include a self-evaluation of the efforts of the State official or agency to meet its small business contracting goals, including a report of set-aside contract awards.

Fiscal Year 2024 Small Business Contracting Compliance Plan

Each agency must provide its State Purchasing Officer with a Small Business Contracting Compliance Plan for Fiscal Year 2024 by **October 5, 2023**. Included with this notice is a template (“FY24 Small Business Contracting Compliance Plan Form”) that may be used to comply with this requirement.

Agencies shall forecast their Fiscal Year 2024 projected awards using the Award Amount on the Purchase Order. These awards are found in the “Award Amount (including initial term plus Renewals):” field on the BidBuy Purchase Order.

An Excel spreadsheet (“FY23 Agency Small Business Contract Data”) containing Award Amounts for Fiscal Year 2023 has been included. The Award Amounts are in column E.

The CPO-GS will notify agencies that their plans have been accepted or rejected by October 12, 2023. If a plan is rejected, the CPO-GS shall provide the basis for the rejection.

Fiscal Year 2023 Small Business Contracting Annual Report

Each agency must provide its State Purchasing Officer with its Small Business Contracting Annual Report for Fiscal Year 2023 by **October 5, 2023**. Included with this notice is a template (“FY23 Small Business Contracting Annual Report Form”) that may be used to comply with this requirement.

An Excel spreadsheet (“FY23 Agency Small Business Contract Data”) containing an agency’s Notice of Award amounts for Fiscal Year 2023 has been included. The Notice of Award amount found on the BidBuy Purchase Order identified in column E was used to calculate Agency Awards with Small Businesses.

Fiscal Year 2023 Small Business Set-Aside Program (SBSP) Contracts

Each agency must provide its State Purchasing Officer with data on contracts that were set-aside in Fiscal Year 2023 for qualified small businesses by **October 5, 2023**. Pursuant to Section 45-45 of the Procurement Code, the CPO-GS must provide the General Assembly with an annual report of all set-aside contracts to small businesses.

An Excel spreadsheet (“FY23 All Agency Small Business Contract Data”) containing an agency’s Notice of Award amounts for Fiscal Year 2023 has been included. The Notice of Award amount in column E is compiled from purchase order data in BidBuy and may not represent all amounts awarded to small businesses. For example, it may not contain information on purchases valued below \$2,000.

Small Business Reporting in SharePoint

Each agency must submit the FY23 Small Business Contracting Annual Report and FY24 Small Business Contracting Compliance Plan through the CPO-GS’ Small Business Reporting SharePoint. Accounts have been created for APOs, and instructions for submission are included with this notice.



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Training Date

All agencies are encouraged to learn more about how to comply with the requirements of this notice. Two live webinars will be held this week to assist agencies in understanding the provided data and the attached forms.

If you are unable to attend the training, please ensure that the Award Amount on any release order from a master contract reflects the value of the release order and not the master contract's Notice of Award amount. Using the master contract's award amount will inflate the awards that small businesses received and inflate the overall award amount of your agency.

Andy Hennig will hold webinars on Wednesday, **September 27, 2023**, at 11:00 AM and Thursday, **September 28, 2023**, at 3:30 PM. A session will be recorded for review at your convenience.

Wednesday, Sep 27, 2023, 11:00 AM

<https://illinois.webex.com/illinois/j.php?MTID=m1e304fef981ab20ebff8e3287076d4dc>

Thursday, Sep 28, 2023, 3:30 PM

<https://illinois.webex.com/illinois/j.php?MTID=md2ff59b4b32eb9e9fea65501ac86a526>

If you have questions regarding this notice or are unable to attend the webinar and have questions about the reporting requirements, please contact your State Purchasing Officer.

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