




CHIEF PROCUREMENT OFFICE

Ellen H. Daley, General Services

Notice 2019.10 General Services

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

From: Ellen H. Daley 

Date: June 5, 2019

Subject: Joint and Cooperative Purchasing

CC: Procurement Compliance Monitors
Procurement Policy Board

This notice amends CPO Notice 2018.04. A CPO Notice which is amended shall include the amended copy and meaning into the original notice. Copy and meaning from the original notice that conflicts with the amendment is no longer my policy nor authoritative.

FOUR JOINT PURCHASING ROLES

The Joint Purchasing Act (30 ILCS 525/) recognizes various roles a State agency may have in a joint purchase. The Chief Procurement Officer for General Services (CPO-GS) commonly refers to the roles as follow:

1. A State agency may “piggyback” onto a contract that resulted from a procurement in which the State agency did not participate in the solicitation or award. Contracts procured by (a) a federal agency, (b) a consortium of governmental, educational, medical, research, or similar entities, or (c) a group purchasing organization of which the CPO-GS or State agency is a member or affiliate may be eligible for a piggyback. The CPO-GS may designate a contract as available for piggyback to all or certain State agencies, governmental units and qualified not-for-profit agencies. Thus, some piggyback contracts may be Joint Purchase Master Contracts as described below.
2. Currently, only the Department of Central Management Services (CMS), the Department of Innovation and Technology (DoIT), or the Chief Procurement Office for General Services (CPOGS) may be the contracting agency to a Joint Purchase Master Contract (JPMC). A JPMC results from a procurement led by (a) either CMS, DoIT, or the CPO-GS, (b) a cooperative, or (c) a consortium. The CPO-GS designates the contract as available to all or certain State agencies, governmental units and qualified not-for-profit



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agencies. CMS, DoIT, or the CPO-GS file JPMCs with the Comptroller as a \$0.00 contract. State agencies that are authorized to use the JPMC must file their own Contract Obligation Document with the Comptroller. Some JPMCs may be procured via piggyback by CMS, DoIT, or the CPO-GS.

3. A State agency may be a “Lead” state entity when the State agency leads a procurement that includes two or more State agencies, governmental units, or qualified not-for-profit agencies. A State agency may also be a “Lead” state entity when the State agency leads a procurement for a cooperative or consortium. Use of the contract is limited to the named participants.
4. A State agency may be a “Participant” state entity when the State agency participates in, but does not lead, a procurement that includes two or more State agencies, governmental units, and non-Illinois governmental units, including cooperatives or consortiums made up of Illinois and/or non-Illinois governmental units. Use of this contract is limited to the named participants.

BidBuy processes are different depending on your agency’s role in the joint purchase procurement. See the applicable BidBuy job aid for details.

FORMS, TEMPLATES, AND GUIDES

All forms, templates, and guides that must be used, not including BidBuy job aids, when making a specific joint or cooperative purchase are on the Unified Procurement Program (UPP) page located on the CPO-GS’s website.

PROCESS AND PROCEDURES

All joint and cooperative purchasing shall be conducted in BidBuy. UPP’s necessary approval of joint and cooperative purchasing will occur in the approval path at the Purchase Order stage before the State Purchasing Officer’s approval except for procurements that are already in progress at the Purchase Order stage as of the effective date of this Notice. For joint purchases that are already in progress at the Purchase Order stage as of the effective date of this Notice, the State Purchasing Officer must use the Reminder feature to obtain UPP’s approval prior to approving the Purchase Order. Please follow the BidBuy job aid for each joint and cooperative procurement process. In addition, the following apply:

1. A separate Authorization for Joint Purchasing form is required for every joint purchase except a piggyback. For a piggyback, the CPO’s approval of the piggyback also contains the authorization for joint purchasing.
2. Agencies shall maintain a procurement file in BidBuy for all joint purchases.
3. Piggyback
 - a. If a cooperative or consortium’s name does not appear on UPP’s page of the CPO-GS’s website as a vetted and approved cooperative or consortium, before an agency requests to piggyback, email CPO.UPP@illinois.gov to inquire whether UPP has vetted and approved the cooperative or consortium for use. UPP will reply to the email informing the agency of one of the following: (1) the cooperative or consortium has been vetted and is approved by the CPO-GS for use, (2) the cooperative or consortium has not been vetted, vetting will begin, and the results will be provided



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to the agency after vetting is complete, or (3) the cooperative or consortium has been vetted and is not approved by the CPO-GS for use. An agency should not start a request for approval of a piggyback prior to receipt of a reply email.

- b. The CPO-GS requires all contractors have an active registration in Illinois Procurement Gateway (IPG) with an expiration date after the agency's contract execution.
 - c. Because a request to piggyback is an exception to a competitive selection process, the requesting agency's Director's signature, not a designee, is required on the Cooperative/Consortium/Federal Agency (CCFA) Piggyback Purchase Request (PPR) form. Approval of UPP and the CPO-GS occur outside BidBuy and must be received prior to starting approvals for the requisition in BidBuy.
 - d. Documentation of the CPO-GS's authorization of the joint purchase is required. The CPO-GS's authorization is included on the PPR form.
4. Joint Purchase Master Contract
- a. When a State agency conducts a solicitation that results in a JPMC, the agency shall use the IFB or RFP template in the Procurement Resources Library accessible on the CPO-GS's website.
 - b. Documentation of the CPO-GS's authorization of the joint purchase is required.
 - c. If the JPMC is the result of a cooperative or consortium's contract in which Illinois is a participant entity, the CPO-GS requires all contractors have an active registration in IPG with an expiration date after the agency's contract execution.
5. Lead Role for a Joint Purchase
- a. When a State agency is the lead state entity for a joint purchase, the State agency shall use the IFB or RFP template in the Procurement Resources Library accessible on the CPO-GS's website.
 - b. Documentation of the CPO-GS's authorization of the joint purchase is required.
6. Participant Role for a Joint Purchase
- a. Documentation of the CPO-GS's authorization of the joint purchase is required.
7. State agencies shall use the CPO-GS Notice of Complaint to Vendor form for **CPO-GS joint purchase master contracts only** if the agency has a complaint regarding a vendor with a CPO-GS joint purchase master contract.
8. The Release off a Multiple Award Master Contract (ROMAC) form no longer requires UPP's comment, which streamlines this process. The SPO's determination on the ROMAC form is still required before the order may be placed.



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For questions regarding this Notice, please email CPO.UPP@illinois.gov.

EFFECTIVE DATE

June 10, 2019