

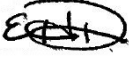


CHIEF PROCUREMENT OFFICE

Ellen H. Daley, General Services

Notice 2022.03 General Services

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

From: Ellen H. Daley 

Date: August 30, 2021

Subject: BEP Timelines for Cooperative-Led Joint Purchases

CC: Procurement Compliance Monitors
Procurement Policy Board

This notice is effective immediately.

When a State agency intends to participate in a cooperative-led procurement or piggyback onto a qualified contract, the agency shall follow the procedures described in this notice and establish a Business Enterprise Program (BEP) contract goal as appropriate.

It is the State's public policy to promote and encourage the economic development of firms certified by BEP and that these firms participate in the State's procurement process as both prime vendors and subcontractors. Cooperative-led joint purchases procured under the Governmental Joint Purchasing Act are subject to the Business Enterprise for Minorities, Women, and Persons with Disabilities Act.

A cooperative-led joint purchase occurs when an agency wants to piggyback off of a contract or participate in a solicitation led by a cooperative, consortium, federal agency, or group purchasing organization that was vetted by the Unified Procurement Program (UPP) and approved by the Chief Procurement Officer for General Services (CPO-GS). Both piggybacks and participations can be agency-specific (only the procuring agency can use the resulting contract) or joint purchase master contracts (available to all or certain governmental units and/or qualified not-for-profits).

Piggyback BEP Timeline

A State agency may piggyback onto a contract competitively procured by a federal agency, consortium, group purchasing organization, or cooperative that resulted from a procurement in which the State agency did not participate in the solicitation or award. Piggybacks are generally limited to no more than one year in duration.

When conducting a piggyback, agencies shall follow this timeline to encourage BEP participation:

Piggyback vendor agrees to the goal...

1. Agency completes the BEP goal setting form and submits to BEP (*if a goal is identified*).
2. BEP reviews the goal setting form.
3. If BEP approves the goal setting, SPO does the same goal setting checks they do for Procurement Code purchases.

Piggyback vendor does not agree to the goal...

1. Agency completes the BEP goal setting form and submits to BEP (*if a goal is identified*).
2. BEP reviews the goal setting form.
3. If BEP approves the goal setting, SPO does the same goal setting checks they do for Procurement Code purchases.



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4. Agency communicates goal to piggyback vendor and encourages participation.
 5. If the piggyback vendor agrees to the goal, it will complete the U-Plan meeting the goal or making a Good Faith Effort.
 6. Agency submits the U-Plan to BEP for review.
 7. If the U-Plan is approved by BEP, the agency submits the Piggyback Purchase Request form for review and approval.
 8. If approved, the agency attaches the Piggyback Purchase Request form, goal setting, U-Plan, and related documentation to the BidBuy requisition.
 9. Notice of Award denotes BEP goal.
 10. All BEP subcontractors are listed in the piggyback contract.
4. Agency communicates BEP goal to piggyback vendor and encourages participation.
 5. If the piggyback vendor does **not** agree to the BEP goal, then its refusal is documented on the Piggyback Purchase Request form.
 6. Agency submits the Piggyback Purchase Request form for review and approval.
 7. If approved, the agency attaches the Piggyback Purchase Request form and the piggyback vendor's BEP refusal to the BidBuy requisition.

Participation BEP Timeline

Cooperative-led participations occur when an Illinois agency wants to participate in a cooperative solicitation and use the resulting contract with the cooperative-awarded vendor(s). Cooperative participation is the preferred cooperative-led joint purchasing method because it allows UPP to post notice of the cooperative solicitation to Illinois vendors giving them better notice of the cooperative opportunity. Unlike piggybacks, contracts resulting from cooperative participations can match the cooperative master contract term.

When conducting a participation, agencies shall follow this timeline:

1. UPP submits an Intent to Participate to the cooperative (*if required*) with the BEP term listed.
2. UPP posts the participation notice (*and includes the BEP term*).
3. Agency transfers participation and starts the participation transfer form (*at requisition*).
4. Agency completes the BEP goal setting form and submits to BEP (*if a goal is identified*).
5. BEP reviews the goal setting form.
6. If BEP approves the goal setting, SPO does the same goal setting checks they do for Procurement Code purchases.
7. Agency communicates the goal to participation vendor.
8. If the participation vendor agrees to the goal, then it completes the U-Plan meeting the goal or making a Good Faith Effort.
9. Agency submits the U-Plan to BEP for review and approval.
10. If BEP approves the U-Plan, the agency submits the Cooperative Purchase Request for State Participants form for review and approval.
11. If approved, the agency attaches the goal setting, U-Plan, Cooperative Purchase Request for State Participants form, and related documentation to the BidBuy requisition.
12. Notice of Award denotes goal.
13. All BEP subcontractors are listed in the participation contract.

If there are questions regarding this notice, please contact your State Purchasing Officer or the Chief Procurement Office at (217) 558-2231.

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