

State Procurement Manual

DOA-3449 N(R06/94) Formerly AD-P-12

		Number PRO-A-4
		Effective 10-31-11
Section INTRODUCTION	Agencies Affected ALL	Replaces 5-7-09
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AUTHORITY: [Wis. Stats.](#) 16.71
16.72(4)
16.75(1)(c)

SCOPE: - to establish guidelines for submitting procurement plans
- to simplify the approval process to obtain purchasing authority for specific transactions as listed in this policy

CONTENT: I. The purpose of the use of procurement plans is to simplify the process of requesting purchasing approval.

II. The following are those transactions that are included in this simplified process. They must be listed in the procurement plan:

- Requests for proposals over \$50,000
- Intergovernmental procurements over \$50,000
- Cooperative purchases with other agencies/governmental entities over \$50,000
- Requests for bids for *services* over \$50,000

III. The following transactions are not included in the procurement plan:

- Requests for bids for *commodities* over \$50,000
Refer to [PRO-C-5](#) for official sealed bidding policy and procedure.
- Purchases using statewide contracts
- Piggyback purchases from other agency contracts
The procuring agency will ensure that piggybacking is an appropriate procurement solution. Refer to [PRO-D-29](#), Piggybacking. A completed [Piggybacking Data Plan](#) must be submitted to the State Bureau of Procurement for all piggyback transactions and e-mailed to: doadlprocplan@wisconsin.gov

IV. Transactions requiring submittal of a Request for Purchasing Approval/Authority (RPA) to the Bureau will not be listed in the plan. (Refer to [PRO-C-2](#), Request for Purchasing Approval/Authority (RPA) Policy and Procedure.) An RPA is required for the following:

- Sole source procurements over \$25,000
Refer to [PRO-C-13](#), Noncompetitive Negotiation (Sole Source).

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- General waivers over \$25,000
Refer to [PRO-C-11](#), General Waiver.
- Motor vehicle purchases for any amount
Refer to [PRO-D-16](#), Procurement of Motor Vehicles.
- Legal service procurements for any amount
Refer to [PRO-I-8](#), Legal Services.
- Collective purchasing with other states or the federal government
Approval thresholds vary depending on the type of collective purchasing request. Refer to [PRO-D-25](#), Collective Purchasing with Other States or the Federal Government.

- PROCEDURE: I. Delegated agencies and agencies not consolidated under Consolidated Agency Purchasing Services (CAPS)
- A. All delegated agencies and agencies not consolidated under CAPS will submit a procurement plan for each anticipated procurement under Content II. to the State Bureau of Procurement for approval.
 - B. The agency's procurement director or designee will complete form [DOA-3720](#), Procurement Plan, for **each** anticipated procurement. The form must be completed in its entirety before it is submitted electronically to the Bureau for approval. The agency must submit plans individually, each one on a completed form DOA-3720, to: doadlprocplan@wisconsin.gov
 - C. The Bureau will forward plans containing information technology-related procurements to the Division of Enterprise Technology.
 - D. The Bureau will forward plans containing limited trades or construction-related procurements to the Division of State Facilities.
 - E. The Bureau will review plans on an individual basis and respond back to the agency with an e-mail that permits the agency to proceed with the procurement outlined in its plan, unless otherwise stipulated. The agency will maintain in its files a copy of the plan along with the Bureau's response.

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- II. Consolidated Agency Purchasing Services (CAPS) agencies
 - A. CAPS agencies will work through their Department of Administration CAPS staff.
 - B. The agency's designated purchasing liaison will complete or have the appropriate person in their agency complete form DOA-3720, Procurement Plan, for each anticipated procurement. The form must be completed in its entirety before it is submitted electronically to the CAPS procurement staff. The agency must submit plans individually, each one on a completed form DOA-3720.
 - C. CAPS will submit consolidated agencies' procurement plans, completed form DOA-3720, to the Bureau for approval at:
doadlprocplan@wisconsin.gov
 - D. The Bureau will forward plans containing information technology-related procurements to the Division of Enterprise Technology.
 - E. The Bureau will forward plans containing limited trades or construction-related procurements to the Division of State Facilities.
 - F. The Bureau will review plans on an individual basis and respond back to CAPS with an e-mail that permits the agency to proceed with the procurement outlined in its plan, unless otherwise stipulated. CAPS will maintain in its files a copy of the plan along with the Bureau's response.
- III. All agencies will achieve delegation status from the Bureau by following the procedures outlined in [PRO-A-3](#), Delegation.
- IV. Printing is delegated in accordance with an agency's level of delegation, but *all* printing must be bid, no best judgment procurements.

Authorized:



Rick Hughes, Director
State Bureau of Procurement