

ATI Procurement Report Worksheet 2015/16

Campus Name: CSU Stanislaus

Please refer to the report instructions before completing this form. The instructions were sent as a separate attachment and they are also posted on the [ATI Annual Reports: Instructions and Reporting Tools](#). The success indicators that have been removed are marked with an asterisk, and the row has been greyed out. New and/or changed success indicators have also been marked with an asterisk.

1.0 Procurement Procedures

Goal	Goal Status	Key Accomplishments	Key Plans
An ATI Electronic and Information Technology E&IT Procurement Plan, documents, forms, and other materials to support 508 procurements at the campus are created and published.	Defined	<ul style="list-style-type: none"> • Training for the Procurement Team was developed and launched • The campus is using the templates provided by the Chancellor's Office to develop plans. • Documentation has been created in draft form pending development by ATI Procurement Ad-Hoc Subcommittee and Procurement Team, and approval by the ATI Steering Committee 	<ul style="list-style-type: none"> • Create an E&IT Procurement store front with approved inventory and documentation • Develop policies, processes, and procedures in association with the Procurement Team and purchasing staff across campus • Develop a process for putting EIT review ahead of entering requisitions into PeopleSoft. • Create a shared repository for VPATS, exemptions, EEAAPs, and Roadmaps
Comments			

Success Indicator	Status	Year Started	Worked on? (Yes/No)	Will work on? (Yes/No)	Evidence/Comments
1.1 Developed and published an Accessible ATI E&IT Procurement Plan	Established	2013	Yes	Yes	A Summary ATI Procurement Campus Plan is published on the ATI Procurement website SP: EIT Procurement Plan
1.2 Developed and published a document that defines what products are categorized as Section 508 E&IT procurements	Established	2013	Yes	Yes	SP/ATI: Section 508 Standards Guide (posted to the ATI Procurement website) SP: EIT Procurement Plan
1.3 * Developed a procedure for procuring E&IT products based on the product/service impact criteria.	Defined	2013	Yes	Yes	SP: EIT Procurement Process Steps Table SP: EIT Procurement Process Form

Success Indicator	Status	Year Started	Worked on? (Yes/No)	Will work on? (Yes/No)	Evidence/Comments
1.4 * Developed a documented process to determine the level/complexity of 508 evaluation that will be required for new procurements and/or renewals.	Initiated	2014	Yes	Yes	SP: Section 508 Standards Guide
1.5 Developed a process for all competitive bid procurements that require an evaluation of Section 508 compliance	Initiated	2014	Yes	Yes	The Procurement Buyer incorporates accessibility review during the competitive bid process, including accessibility submission requirements. SP: EIT Formal Bid Process for New Product_Service
1.6 Developed a process for all non-competitive bid procurements that require an evaluation of Section 508 compliance	Defined	2014	Yes	Yes	The Procurement Buyer incorporates accessibility review during the competitive bid process, including accessibility submission requirements. SP: EIT Formal Bid Process for New Product_Service
1.7 Developed a process for all purchase card purchases that require an evaluation of Section 508 compliance	Not Started				
1.8 Documented a process used to verify Voluntary Product Accessibility Templates (VPATs)	Initiated	2016	Yes	Yes	SP: Pre-VPAT Evaluation Form

Area(s) of Requested Collaboration for Procurement Procedures	Indicator Number	Assistance Requested? Yes/No	Assistance Offered? Yes/No	Comments
Briefly describe the areas in which your campus would like to collaborate with other campuses and the ATI staff	1.2	Yes		Request the Chancellor's Office provide a list of PeopleSoft procurement codes that fit the EIT categories.
Briefly describe the areas in which your campus would like to collaborate with other campuses and the ATI staff	1.3	Yes		How do other campuses prescreen the purchases to determine which ones are EIT?

2.0 Staffing or role definition

Goal	Goal Status	Key Accomplishments	Key Plans
ATI procurement team is fully staffed with clearly defined roles for processing E&IT procurements.	Defined	<ul style="list-style-type: none"> Roles and Responsibilities are defined in draft form. Created a Procurement team for ATI, to include the following: Buyers, Procurement Manager, OIT staff, ATI Coordinator, and EIT Procurement Ad Hoc Committee Chair. 	<ul style="list-style-type: none"> Determine final role and responsibilities for the campus that does not put an undue burden on department staff Develop a communication channel to inform the campus of EIT Procurement requirements, resources, and processes

Goal	Goal Status	Key Accomplishments	Key Plans
		<ul style="list-style-type: none"> Developed and implemented orientation and training sessions for the Procurement Team 	<ul style="list-style-type: none"> Create an online training module for Procurement staff and those who order EIT Work with the OIT staff person responsible for quotes to develop this as a primary ATI role
Comments	We focused on exploring CSULA as a model for an EIT Procurement process. Difficulties arose in how to assign roles to our existing staff, and whether the bulk of the work would be done in the Procurement Department or by department staff.		

Success Indicator	Status	Year Started	Worked on? Yes/No	Will work on? Yes/No	Evidence/Comments
2.1 Established a group that meets on a regular basis to discuss accessible procurement topics	Established	2012	Yes	Yes	ATI Steering Committee 4x per year CSU ATI Procurement Community of Practice Monthly ATI Ad Hoc Procurement Sub Committee Bi-Weekly Procurement Department staff trainings 1-2 per month
2.2 Identified contact person(s) and process for E&TI product/service provider, purchase requestors, and staff to ask questions about procurements.	Established	2012	Yes	Yes	Procurement Officer/Ad-Hoc Proc. Sub-Committee Chair: Phyllis Crittendon ATI Coordinator/ESSC: Tawn Gillihan
2.3 * Documented in writing who is responsible for each component of the accessible procurement process (e.g., Who does the purchase request? Who interacts with the EIT product/service provider on accessibility questions? Who does the accessibility evaluation of the product?).	Defined	2012	Yes	Yes	SP: ATI Roles & Responsibilities for OIT SP: ATI Roles & Responsibilities for Non_OIT These roles are in development in conversations and trainings with buyers and campus requestors. When complete, we will publish the Roles and Responsibilities for each area of EIT Procurement.

Area(s) of Requested Collaboration for Staffing or role definition	Indicator Number	Assistance Requested? Yes/No	Assistance Offered? Yes/No	Comments
Briefly describe the areas in which your campus would like to collaborate with other campuses and the ATI staff				
Briefly describe the areas in which your campus would like to collaborate with other campuses and the ATI staff				

3.0 Exemptions Process

Goal	Goal Status	Key Accomplishments	Key Plans
A well-documented process has been established and is used for exemptions to E&IT procurements.	Initiated	<ul style="list-style-type: none"> Several purchases of EIT were reviewed using the Procurement EIT form in testing 	<ul style="list-style-type: none"> Develop the ATI Procurement webpage into a fully usable resource for the EIT Procurement process Develop clear guidelines on the roles, policies, and procedures for EIT Procurement Develop plan to notify the Procurement ATI Team early in the planning process for EIT Purchases
Comments	<ul style="list-style-type: none"> Use the resources created by the Chancellor's Office to stay consistent with other campuses, and with Procurement at CSULA 		

Success Indicator	Status	Year Started	Worked on? Yes/No	Will work on? Yes/No	Evidence/Comments
3.1 * Established a process for approving exemptions.	Initiated	2010	Yes	Yes	SP: EIT Procurement Process Steps Table
3.2 Documented the exemption process, posted it on public website, and have communicated process to campus	Initiated	2010	Yes	Yes	SP: Procurement EIT Exemption
3.3 Documented a process that ensures that supplementary accommodations can be put in place when exemptions are warranted	Initiated	2015	Yes	Yes	Procurement EIT Exemption form created in draft form and posted to the ATI Procurement Sharepoint site.
3.4 * Established a follow-up process for communicating with EIT product/service provider and purchase requesters when a procurement is moved forward without total resolution of the accessibility status of the product.	Initiated	2015	Yes	Yes	Procurement Officer follows up and contacts ATI Coordinator as needed

Area(s) of Requested Collaboration for Exemptions Process	Indicator Number	Assistance Requested? Yes/No	Assistance Offered? Yes/No	Comments
Briefly describe the areas in which your campus would like to collaborate with other campuses and the ATI staff	3.3	Yes		Please provide examples of processes for supplementing accommodations.
Briefly describe the areas in which your campus would like to collaborate with other campuses and the ATI staff				

4.0 Equally Effective Access Plans

Goal	Goal Status	Key Accomplishments	Key Plans
Equally Effective Access Plans are created for E&IT products that are not fully 508 compliant.	Initiated	<ul style="list-style-type: none"> • Ad Hoc Work Group met regularly to develop roles, responsibilities, and processes for EIT Procurement • Equally Effective Alternate Access Plan posted to Sharepoint pending approval by the ATI Steering Committee • Document processes for training and implementation 	<ul style="list-style-type: none"> • Develop and implement process for creating EEAPs for EIT purchases
Comments			

Success Indicator	Status	Year Started	Worked on? Yes/No	Will work on? Yes/No	Evidence/Comments
4.1 * Documented a process that outlines when an equally effective access plan is necessary	Initiated	2012	Yes	Yes	SP: EIT Procurement Plan SP: Determination of EEAAP Guidelines SP: Equally Effective Alternate Access Plan
4.2 * Established a process with roles assigned for all parts of creating an equally effective alternate access plan.	Initiated	2012	Yes	Yes	SP: EIT Procurement Plan SP: ATI Roles & Responsibilities for OIT SP: ATI Roles & Responsibilities for Non_OIT
4.3 * Established a process that tracks how many equally effective alternate access plans have been created.	Initiated	2012	Yes	Yes	SP: ATI Coordinator will track for OIT EEAAPs SP: Procurement Officer/Buyer will track for Non-OIT EEAAPs
4.4 Established a process to ensure that accommodations were provided.	Not Started				

Area(s) of Requested Collaboration for Equally Effective Access Plans	Indicator Number	Assistance Requested? Yes/No	Assistance Offered? Yes/No	Comments
Briefly describe the areas in which your campus would like to collaborate with other campuses and the ATI staff				
Briefly describe the areas in which your campus would like to collaborate with other campuses and the ATI staff				

5.0 Training

Goal	Goal Status	Key Accomplishments	Key Plans
All parties involved in E&IT procurement have been trained, and a continual training program is in place.	Defined	<ul style="list-style-type: none"> • Developed a Procurement training plan with materials • Providing training in a variety of formats including presentations, video, tutorials, slides, etc. • Training materials for EIT Procurement posted on the ATI website 	<ul style="list-style-type: none"> • The ATI Coordinator will communicate with HR Training staff to develop comprehensive training plans • Create a training package for new staff and faculty orientations • Training will be provided on an ongoing basis, utilizing an in-person and self-service delivery model • Develop EIT Procurement training module for new faculty and staff orientation • Expand participation in the CSU ATI Communities of Practice for Procurement to include the Procurement staff
Comments	We are struggling to assign roles and responsibilities given our lack of staffing resources. Determining whether the responsibility for complying with EIT Procurement lies with the Procurement Department, the department staff, or some combination has interrupted the training process.		

Success Indicator	Status	Year Started	Worked on? Yes/No	Will work on? Yes/No	Evidence/Comments
5.1 Established and deployed new employee orientation training materials that provide overview of Section 508 requirements and where to get more information	Initiated	2012	Yes	Yes	The ATI Coordinator and Procurement Specialist will work with Human Resources and Faculty Affairs to incorporate EIT Procurement in New Employee Orientations.
5.2 * Established and deployed training program for purchase requestors and administrative support staff.	Defined	2014	Yes	Yes	SP: Implementation Training Plan for Procurement Staff
5.3 * Established and deployed training program for Information Technology Staff.	Defined	2014	Yes	Yes	OIT Purchasing staff included in discussions and trainings with Procurement team.
5.4 * Established and deployed training program for Buyers (procurement staff).	Established	2012	Yes	Yes	SP: Implementation Training Plan for Procurement Staff
5.5 Established and deployed training for all purchase card holders	Not Started			Yes	
5.6 * Established a plan that provides resources for the Section 508 Compliance officer and ATI Designee or other Designee to participate in professional development and continuing education opportunities.	Initiated	2012	Yes	Yes	The ATI Coordinator participates in the CSU Communities of Practice, but a formal training plan has not been developed. We will create a training plan and budget.

Success Indicator	Status	Year Started	Worked on? Yes/No	Will work on? Yes/No	Evidence/Comments
5.7 Collected feedback from training (effectiveness, knowledge retention, etc.)	Initiated	2014	Yes	Yes	Training for the Procurement Team was developed and launched
5.8 Established methods for retraining individuals and departments to refresh knowledge of the E&IT procurement process	Initiated	2012	Yes	Yes	At this time refreshing knowledge would be a one-on-one session or a referral to the Chancellor's Office ATI Procurement website or other online resource

Area(s) of Requested Collaboration for Training	Indicator Number	Assistance Requested? Yes/No	Assistance Offered? Yes/No	Comments
Briefly describe the areas in which your campus would like to collaborate with other campuses and the ATI staff				
Briefly describe the areas in which your campus would like to collaborate with other campuses and the ATI staff				

6.0 Outreach (Communications)

Goal	Goal Status	Key Accomplishments	Key Plans
All individuals on campus involved in the purchasing of goods are knowledgeable about Section 508 in the context of E&IT procurement.	Initiated	<ul style="list-style-type: none"> • Distributed information on EIT Procurement requirements at tech fairs, workshops, and department meetings. • Revised the ATI Procurement website to include additional information 	<ul style="list-style-type: none"> • Creating online training videos for posting and distribution to procurement staff across campus • Set up period announcements with general EIT Procurement information and contact information
Comments			

Success Indicator	Status	Year Started	Worked on? Yes/No	Will work on? Yes/No	Evidence/Comments
6.1 * Removed					

Success Indicator	Status	Year Started	Worked on? Yes/No	Will work on? Yes/No	Evidence/Comments
6.2 * Established a process for working collaboratively with vendors during the procurement process to assess and improve the accessibility of their product (i.e. VPAT review process, Accessibility Roadmap).	Initiated	2012	Yes	Yes	SP: EIT Procurement Plan and Roles & Responsibilities
6.3 Established an ongoing general campus communication that promotes E&IT procurement awareness	Defined	2012	Yes	Yes	SP: ATI Communication & Awareness Plan (Procurement Section) SP: ATI Procurement Communication & Training Plan

Area(s) of Requested Collaboration for Outreach (Communication)	Indicator Number	Assistance Requested? Yes/No	Assistance Offered? Yes/No	Comments
Briefly describe the areas in which your campus would like to collaborate with other campuses and the ATI staff				
Briefly describe the areas in which your campus would like to collaborate with other campuses and the ATI staff				

7.0 Evaluation & Monitoring

Goal	Goal Status	Key Accomplishments	Key Plans
Campus has established a continual evaluation process with standard forms and procedures. Feedback from the process along with direction is provided to training, outreach, and other groups involved in E&IT procurements.	Initiated		
Comments			

Success Indicator	Status	Year Started	Worked on? Yes/No	Will work on? Yes/No	Evidence/Comments
7.1 * Removed					
7.2 * Removed					
7.3 * Removed					
7.4 * Established metrics to evaluate the effectiveness of the ATI procurement process and procedures process.	Not Started				
7.5 * Established metrics to evaluate the effectiveness of the Equally Effective Alternate Access process.	Not Started				
7.6 * Established metrics to evaluate the effectiveness of campus training process.	Initiated	2014	Initiated	2014	Yes
7.7 * Establish metrics to evaluate the effectiveness of campus outreach process.	Not Started				

Area(s) of Requested Collaboration for Evaluation & Monitoring	Indicator Number	Assistance Requested? Yes/No	Assistance Offered? Yes/No	Comments
Briefly describe the areas in which your campus would like to collaborate with other campuses and the ATI staff				
Briefly describe the areas in which your campus would like to collaborate with other campuses and the ATI staff				

8.0 Experience/Implementation

Goal	Goal Status	Key Accomplishments	Key Plans
Campuses have sufficient experience and expertise in completing E&IT procurements.	Defined		<ul style="list-style-type: none"> Submit staffing proposal to the ATI Steering Committee for consideration
Comments	The campus needs to appoint and EIT Procurement Specialist or Manager to lead the ATI Procurement implementation on campus. Current staffing levels to evaluate VPATs, create EEAAPs, or issue exemptions are not in place.		

Success Indicator	Numeric value	Evidence/Comments
8.1 * Removed		
8.2 * Removed		
8.3 * Removed		
8.4 * Removed		
8.5 * Total number of E&IT reviews?	0	In 2015/16 we did not yet have staff assigned to the role of reviewer. We began reviewing VPATs in 2016/17 and have three so far as of December 2016.
8.6 * What is the total percentage of EEAAP's?	0	
8.7 * What is the total number of exemptions/exceptions?	0	

Area(s) of Requested Collaboration for Experience/Implementation	Indicator Number	Assistance Requested? Yes/No	Assistance Offered? Yes/No	Comments
Briefly describe the areas in which your campus would like to collaborate with other campuses and the ATI staff				
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Contributors

This information will be used for follow up questions and collaboration.

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