

Pro CAR AY 14/15

1. Campus

Campus Name - Required

Stanislaus

2. 1.0 Procurement Procedures

Goal 1.0: 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.

1.0 Goal Status - Required

Initiated

Key Accomplishments AY 14/15 (Please list 3 to 5)

Accomplishment 1 : Training for the Procurement Team is in development.

Accomplishment 2 : Draft versions of EIT documents are created and saved on Sharepoint for the ATI Steering Committee's use. Approval is pending.

Accomplishment 3 : The campus is using the templates provided by the Chancellor's Office to develop plans.

Accomplishment 4 : The ATI Procurement website links to the Chancellor's Office ATI Procurement website.

Key Plans 15/16 (Please list 3 to 5)

Plan 1 : Training for the Procurement Team begins in September 2015 with a needs assessment, general overview of disability, and EIT Procurement Roles & Responsibilities.

Plan 2 : Develop policies, processes, and procedures in association with the Procurement Team and purchasing staff across campus.

Plan 3 : Develop a process for putting EIT review ahead of entering requisitions into PeopleSoft.

Plan 4 : Create a shared repository for VPATS, exemptions, EEAAPs, and Roadmaps.

Plan 5 : Revise the ATI Procurement web page.

Comments

- SP: indicates documents are located on the ATI Steering Committee Sharepoint website
- ATI: indicates documents are published on the ATI Procurement website
- In Success Indicators marked 'Initiated', 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.

1.0 Success Indicators

	Status - Required	Year Started	Worked on in AY 14/15	Will work on in 15/16	Comments
			Yes	Yes	
1.1 Developed and published an Accessible ATI E&IT Procurement Plan.	Defined	2013	X	X	SP: EIT Procurement Plan The ATI Procurement Plan will be revised in 2015/16
1.2 Developed and published a document that defines what products are categorized as Section 508 E&IT procurements.	Established	2013	X	X	SP/ATI: Section 508 Standards Guide (posted to the ATI Procurement website) SP: EIT Procurement Plan
*1.3 REVISED Developed a procedure for procuring E&IT products based on the product/service impact criteria.	Initiated	2013	X	X	SP: EIT Procurement Process Steps Table SP: EIT Procurement Process Form
*1.4 REVISED Developed a documented process to determine the level/complexity of 508 evaluation that will be required for new procurements and/or renewals.	Initiated	2014	X	X	SP: Section 508 Standards Guide Develop this process is 2015/16
1.5 Developed a process for all competitive bid procurements that require an evaluation of Section 508 compliance.	Initiated	2014	X	X	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.	Initiated	2014	X	X	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				SP: EIT Procurement Plan includes a section for PCard purchases
1.8 Documented a process used to verify Voluntary Product Accessibility Templates (VPATs).	Not Started				VPAT review will be completed using the EIT Procurement Review form, but staff not yet designated for this process.

Collaborating on Goal 1 - Procurement Procedures

	1.0 Success Indicator Number	Assistance Requested	Assistance Offered	Comments
		Yes	Yes	
1	1.2	X		Request the Chancellor's Office provide a list of PeopleSoft procurement codes that fit the EIT categories.
2	1.3	X		How do other campuses prescreen the purchases to determine which ones are EIT?
3				
4				
5				

3. 2.0 Staffing or Role Definition

Goal 2.0: ATI procurement team is fully staffed with clearly defined roles for processing E&IT procurements.

2.0 Goal Status - Required

Initiated

Key Accomplishments AY 14/15 (Please list 3 to 5)

Accomplishment 1 : Roles and Responsibilities are defined in draft form.

Accomplishment 2 : Created a Procurement team for ATI, to include the following: Buyers, Procurement Manager, OIT staff, ATI Coordinator, and EIT Procurement Ad Hoc Committee Chair.

Key Plans 15/16 (Please list 3 to 5)

Plan 1 : Continue to develop roles & responsibilities and procedures based on the Chancellor's Office model.

Plan 2 : A new committee of campus leaders is forming to address issues of ADA and accessibility.

Comments

- A significant issue we have with creating an accessible EIT Procurement process, is the need for a specially trained ATI Procurement Specialist who will be the point of contact for the campus for EIT Procurement, will coordinate the collection of required documentation, and will provide impact ratings, approvals, EEAAPs, exemptions, and vendor education and roadmaps. This position can be assigned to Procurement or to OIT.

2.0 Success Indicators

	Status - Required	Year Started	Worked on in AY 14/15	Will work on in 15/16	Comments
			Yes	Yes	
2.1 Established a group that meets on a regular basis to discuss accessible procurement topics.	Defined	2012	X	X	ATI Steering Committee 4x per year CSU ATI Procurement Community of Practice Monthly ATI Ad Hoc Procurement Sub Committee Bi-Weekly
2.2 Identified contact person(s) and process for vendors, purchase requestors, and staff to ask questions about procurements.	Defined	2012	X	X	Procurement Officer/Ad-Hoc Proc. Sub-Committee Chair: Phyllis Crittendon ATI Coordinator/ESSC: Tawn Gillihan
*2.3 REVISED 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	Initiated	2012	X	X	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.

Collaborating on Goal 2 - Staffing or Role Definition

2.0 Success Indicator Number	Assistance Requested	Assistance Offered	Comments
	Yes	Yes	
1			
2			
3			

4. 3.0 Exemptions Process

Goal 3.0: A well-documented process has been established and is used for exemptions to E&IT procurements.

3.0 Goal Status - Required

Initiated

Key Accomplishments AY 14/15 (Please list 3 to 5)

Accomplishment 1 : Develop plan to notify the Procurement ATI Team early in the planning process for EIT Purchases.

Accomplishment 2 : Develop clear guidelines on the roles, policies, and procedures for EIT Procurement.

Accomplishment 3 : Develop the ATI Procurement webpage into a fully usable resource for the EIT Procurement process.

Accomplishment 4 : Use the resources created by the Chancellor’s Office to stay consistent with other campuses.

Accomplishment 5 : Several purchases of EIT were reviewed using the Procurement EIT form in testing.

Key Plans 15/16 (Please list 3 to 5)

Plan 1 : Will develop an exemption process in association with the ATI Procurement team to develop a process.

Plan 2 : The exemption process will be posted to the ATI Procurement website on approval of the ATI Steering Committee.

Plan 3 : Investigate PeopleSoft and/or Sharepoint workflows for incorporating EIT Procurement methods (attach a VPAT to the PS requisition, use codes for EIT in requisition).

Comments

3.0 Success Indicators

	Status - Required	Year Started	Worked on in AY 14/15	Will work on in 15/16	Comments
			Yes	Yes	
*3.1 REVISED Established a process for approving exemptions.	Initiated	2010	X	X	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	X	X	SP: Procurement EIT Exemption
3.3 Documented a process that ensures that supplementary accommodations can be put in place when exemptions are warranted.	Not Started				Procurement EIT Exemption form created in draft form and posted to the ATI Procurement Sharepoint site
*3.4 REVISED 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.	Not Started				

Collaborating on Goal 3 - Exemptions Process

	3.0 Success Indicator Number	Assistance Requested	Assistance Offered	Comments
		Yes	Yes	
1	3.3	X		Please provide examples of processes for supplementing accommodations.
2				
3				
4				

5. 4.0 Equally Effective Access Plans

Goal 4.0: Equally Effective Access Plans are created for E&IT products that are not fully 508 compliant.

4.0 Goal Status - Required

Initiated

Key Accomplishments AY 14/15 (Please list 3 to 5)

Accomplishment 1 : Formed Ad Hoc Work Group to develop roles, responsibilities, and processes for EIT Procurement.

Accomplishment 2 : Purchasing Contracts Officer works to create EEAPs for EIT purchases.

Accomplishment 3 : Equally Effective Alternate Access Plan posted to Sharepoint pending approval by the ATI Steering Committee.

Accomplishment 4 : Document processes for training and implementation.

Key Plans 15/16 (Please list 3 to 5)

Plan 1 : Draft version of EEAAP guidelines in development

Comments

4.0 Success Indicators

	Status - Required	Year Started	Worked on in AY 14/15	Will work on in 15/16	Comments
			Yes	Yes	
*4.1 REVISED Documented a process that outlines when an equally effective alternate access plan is necessary.	Initiated	2012	X	X	SP: EIT Procurement Plan SP: Determination of EEAAP Guidelines SP: Equally Effective Alternate Access Plan
*4.2 REVISED Established a process with roles assigned for all parts of creating an equally effective alternate access plan.	Initiated	2012	X	X	SP: EIT Procurement Plan SP: ATI Roles & Responsibilities for OIT SP: ATI Roles & Responsibilities for Non_OIT
*4.3 REVISED Established a process that tracks how many equally effective alternate access plans have been created.	Initiated	2012		X	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				

Collaborating on Goal 4 - Equally Effective Access Plans

	4.0 Success Indicator Number	Assistance Requested	Assistance Offered	Comments
		Yes	Yes	
1				
2				
3				
4				

6. 5.0 Training

Goal 5.0: All parties involved in E&IT procurement have been trained, and a continual training program is in place.

5.0 Goal Status - Required

Defined

Key Accomplishments AY 14/15 (Please list 3 to 5)

Accomplishment 1 : Developed a Procurement training plan with materials.

Accomplishment 2 : Providing training in a variety of formats including presentations, video, tutorials, slides, etc.

Accomplishment 3 : Training materials for EIT Procurement posted on the ATI website.

Key Plans 15/16 (Please list 3 to 5)

Plan 1 : The ATI Coordinator will communicate with HR Training staff to develop comprehensive training plans.

Plan 2 : Create a training package for new staff and faculty orientations

Plan 3 : Training will be provided on an ongoing basis, utilizing an in-person and self-service delivery model.

Plan 4 : Develop EIT Procurement training module for new faculty and staff orientation.

Comments

The Procurement Team completed a survey prior to the beginning of training to assess needs, attitudes, and competencies. There was little awareness of EIT, legal requirements, VPATs, etc. Training has been created and is ongoing to address these issues.

5.0 Success Indicators

	Status - Required	Year Started	Worked on in AY 14/15	Will work on in 15/16	Comments
			Yes	Yes	
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		X	The ATI Coordinator and Procurement Specialist will work with Human Resources and Faculty Affairs to incorporate EIT Procurement in New Employee Orientations.
*5.2 REVISED Established and deployed training program for purchase requestors and administrative support staff.	Defined	2014	X	X	
*5.3 REVISED Established and deployed training program for Information Technology Staff.	Defined	2014	X	X	OIT Purchasing staff included in discussions and trainings with Procurement team.
*5.4 REVISED Established and deployed training program for Buyers (procurement staff).	Defined	2012	X	X	
5.5 Established and deployed training for all purchase card holders.	Not Started			X	
*5.6 REVISED 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	X	X	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.
5.7 Collected feedback from training (effectiveness, knowledge retention, etc.).	Initiated	2014	X	X	Training for the Procurement Team was developed and launched in 2015/16
5.8 Established methods for retraining individuals and departments to refresh knowledge of the E&IT procurement process.	Initiated	2012		X	

Collaborating on Goal 5 - Training

	5.0 Success Indicator Number	Assistance Requested	Assistance Offered	Comments
		Yes	Yes	
1				
2				
3				
4				
5				

7. 6.0 Outreach (Communications)

Goal 6.0: All individuals on campus involved in the purchasing of goods are knowledgeable about Section 508 in the context of E&IT procurement.

6.0 Goal Status - Required

Initiated

Key Accomplishments AY 14/15 (Please list 3 to 5)

Accomplishment 1 : Refreshed the large-scale bulletin board in the library/OIT offices to promote awareness of ATI, including EIT Procurement.

Accomplishment 2 : Distributed information on EIT Procurement requirements at tech fairs, workshops, and department meetings.

Accomplishment 3 : ATI Coordinator attended multiple workshops and committee meetings to present the ATI requirements.

Key Plans 15/16 (Please list 3 to 5)

Plan 1 : ATI Coordinator will work with EIT vendors to educate them on EIT Procurement compliance.

Plan 2 : Procurement Officer/Buyer will work with Non-OIT vendors to educate them on EIT Procurement compliance.

Plan 3 : ATI Coordinator and the Procurement Sub-Committee Chair will work to provide general campus communications and will include communications related to E&IT procurement.

Plan 4 : Add accessibility training to the required Human Resources training modules.

Comments

6.0 Success Indicators

	Status - Required	Year Started	Worked on in AY 14/15	Will work on in 15/16	Comments
			Yes	Yes	
*6.2 REVISED Established a process for working collaboratively with vendors during the procurement process to asses and improve the accessibility of their product (i.e. VPAT review process, Accessibility Roadmap).	Initiated	2012	X	X	SP: EIT Procurement Plan and Roles & Responsibilities
6.3 Established an ongoing general campus communication that promotes E&IT procurement awareness.	Initiated	2012	X	X	SP: ATI Communication & Awareness Plan (Procurement Section) SP: ATI Procurement Communication & Training Plan

Collaborating on Goal 6 - Outreach (Communications)

	6.0 Success Indicator Number	Assistance Requested	Assistance Offered	Comments
		Yes	Yes	
1				
2				
3				

8. 7.0 Evaluation and Monitoring

Goal 7.0: 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.

7.0 Goal Status - Required

Initiated

Key Accomplishments AY 14/15 (Please list 3 to 5)

Accomplishment 1 : Training for Procurement staff and key purchasers was in development by the end of this reporting period.

Key Plans 15/16 (Please list 3 to 5)

Plan 1 : SP: ATI Implement Survey for Procurement Staff conducted prior to the start of training, and will be the basis of training for 2015/2016.

Plan 2 : After training surveys will be administered.

Plan 3 : Metrics to measure the effectiveness of training will be created and recorded.

Comments

7.0 Success Indicators

	Status - Required	Year Started	Worked on in AY 14/15	Will work on in 15/16	Comments
			Yes	Yes	
*7.4 NEW Established metrics to evaluate the effectiveness of the ATI procurement process and procedures process.	Not Started				
*7.5 NEW Established metrics to evaluate the effectiveness of the Equally Effective Alternate Access process.	Not Started				
*7.6 NEW Established metrics to evaluate the effectiveness of campus training process.	Initiated	2014	X	X	SP: ATI Implement Survey for Procurement Staff
*7.7 NEW Establish metrics to evaluate the effectiveness of campus outreach process.	Not Started			X	When EIT Procurement training is launched for the campus, pre-training and post-training surveys will be conducted.

Collaborating on Goal 7 - Evaluation and Monitoring

	7.0 Success Indicator Number	Assistance Requested	Assistance Offered	Comments
		Yes	Yes	
1				
2				
3				

9. 8.0 Experience/Implementation

Goal 8.0: Campuses have sufficient experience and expertise in completing E&IT procurements.

8.0 Goal Status - Required

Initiated

Key Accomplishments AY 14/15 (Please list 3 to 5)

Key Plans 15/16 (Please list 3 to 5)

Comments

The campus needs to appoint and EIT Procurement Specialist or Manager to lead the ATI Procurement implementation on campus.

Currently no one is qualified to evaluate VPATs, create EEAAPs, or issue exemptions.

8.0 Success Indicators 8.1-8.3

	Response for AY 14/15 - Required	Comments
*8.5 NEW What is the total number of E&IT reviews?	0	
*8.6 NEW What is the total percentage of EEAAP's?	0	
*8.7 NEW What is the total number of exemptions/exceptions?	0	

Collaborating on Goal 8 - Experience/Implementation

	8.0 Success Indicator Number	Assistance Requested	Assistance Offered	Comments
		Yes	Yes	
1	*8.5	X		Please provide examples or templates for recording this information.
2	*8.6	X		Please provide examples or templates for recording this information.
3	*8.7	X		Please provide examples or templates for recording this information.
4				

10. Contributors

Final Comments

Our ATI Procurement Plan for 2014/15 is in development. Once it is complete, we will move to the ATI Procurement Plan for 2015/16.

Contributors

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5					

Required - Updated Campus Plan Declaration

Yes

Request for Submission Notification

Please send an email verifying submission of this report to:

Name:

Tawn Gillihan

Email:

tgillihan@csustan.edu

Request for PDF Copy of Responses

Please send a PDF copy of this report to:

Name:

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Required - This report has been approved by Campus Sponsor:

Tawn Gillihan