

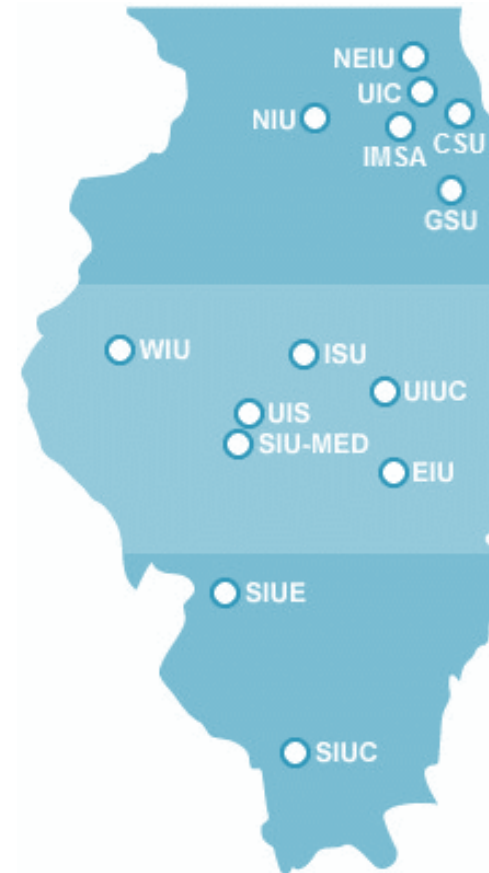
# Annual Small Business Presentation



- ▶ **Bridget McHatton** - Chief Procurement Officer (CPO) Public Institutions of Higher Education
- ▶ **Catherine Bradbury** - State Purchasing Officer/ Small Business Specialist

# Chief Procurement Offices

- Public Institutions of Higher Education
  - <https://cpo-highered.illinois.gov/>
- Capital Development Board
  - [www.illinois.gov/cpo/cdb](http://www.illinois.gov/cpo/cdb)
- Department of Transportation
  - <https://cpo-dot.illinois.gov/>
- General Services
  - <https://cpo-general.illinois.gov/>



# Table of Contents

- I. Procurement Code and Rules
- II. Requirements
- III. Procurement Programs
- IV. Resources

# I. Procurement Code and Rules

- ▶ Illinois Procurement Code

- ▶ 30 ILCS 500

- ▶ <https://www.ilga.gov/legislation/ilcs/ilcs3.asp?ActID=532&ChapterID=7>

- ▶ Standard Procurement Rules

- ▶ 44 Illinois Administrative Code 4

- ▶ <https://www.ilga.gov/commission/jcar/admincode/044/04400004sections.html>

## II. Requirements

Be a legal entity authorized to do business in Illinois

- <https://www.ilsos.gov/>

Register with the Illinois State Board of Elections

- <https://BEREP.elections.il.gov>

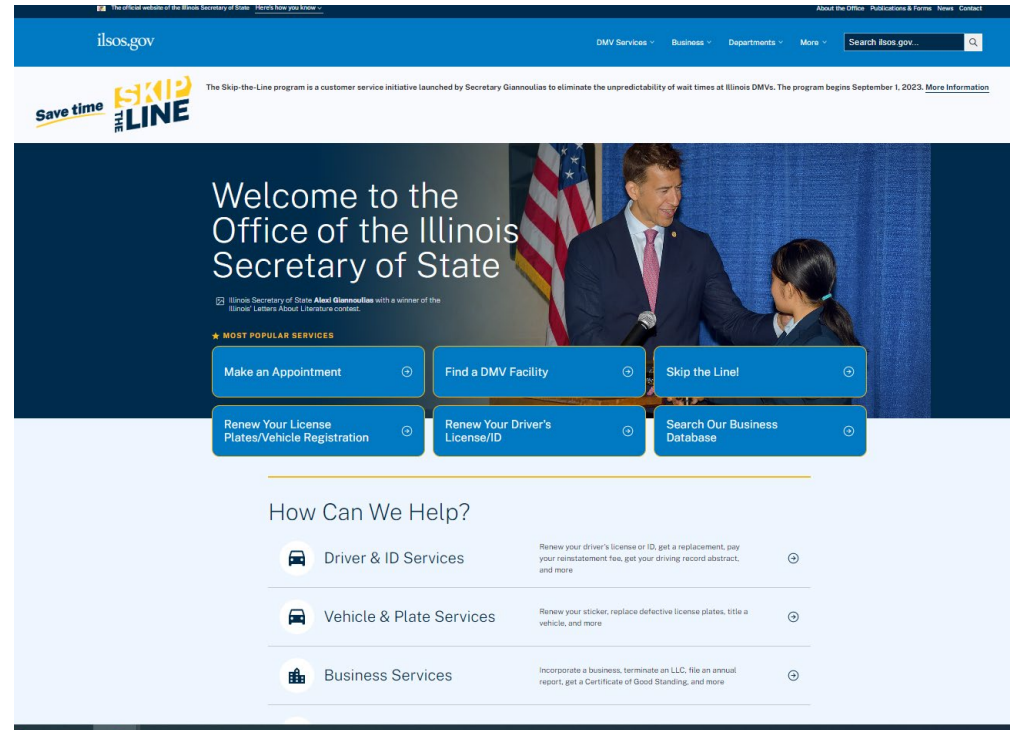
Hold a current Illinois Department of Human Rights (IDHR) bidder number

- [www.Illinois.gov/dhr/PublicContracts](http://www.Illinois.gov/dhr/PublicContracts)

Construction may require prequalification

# II. Requirements

Illinois Secretary of State - <https://www.ilsos.gov/>



# II. Requirements

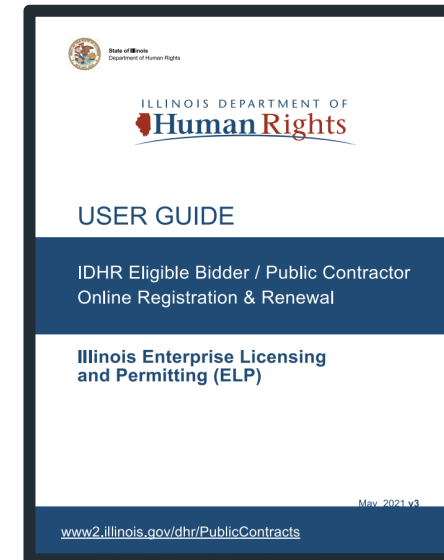
Illinois State Board of Elections - <https://BEREP.elections.il.gov>

The screenshot shows the main website for the Illinois State Board of Elections. At the top, the title "ILLINOIS STATE BOARD OF ELECTIONS" is displayed in a serif font. Below the title is a navigation menu with links for "Information For Voters", "Campaign Disclosure", "Running for Office", "Candidate Filing and Results", "Business Registration", "Press Room", and "About The Board". A secondary navigation bar contains a link to the "State of Illinois Coronavirus Response Site". The main content area features a "Business Registration Menu" with three columns: "Business Entity Registration" (with links for account creation, website information, and registration steps), "Search" (with links for finding registered businesses and affiliates), and "Frequently Asked Questions" (with links for definitions of business entity, affiliated person, and executive employee). The footer contains contact information for Springfield and Chicago offices, external links like "Illinois Amber Alert" and "National Center for Missing and Exploited Children", and a "Contact Us" section with links for employment opportunities, feedback, publications, and a glossary.

This screenshot shows the "Business Entity Registration for Procurement" page. It features a login form with fields for "Username:" and "Password:" and a "Log In" button. Below the form are links for "Don't have an account?", "Forgot your password?", and "Forgot your username?". To the right, an "Announcements" box contains a welcome message. A prominent warning box states: "THIS IS A PRIVATE SITE established by the Illinois State Board of Elections intended for the use of businesses required to register under the Disclosure Act, 10 ILCS 5/9-35, and 30 ILCS/20-160 and 30 ILCS 500/50-37 of the Procurement Act. Be forewarned: Unauthorized use of this site or tampering with this site are computer crimes and may be prosecuted under Article D of the Illinois Criminal Code." A link "Do you need help with the BEREP site?" is located below the login form. The footer includes the copyright notice "©2009 Illinois State Board of Elections".

# II. Requirements

Illinois Department of Human Rights - [www.illinois.gov/dhr/PublicContracts](http://www.illinois.gov/dhr/PublicContracts)





# III. Procurement Programs

- Business Enterprise Program (BEP)
- Veteran Business Program (VBP)
- State Use
- Small Business Program

# Business Enterprise Program

- Promotes the economic development of small businesses owned by Minorities, Women, and Persons with Disabilities. State agencies and universities have a goal to buy at least 30% of goods and services from BEP certified businesses.
- **Do I Qualify?**
  - At least 51% owned and controlled by persons who are minority, women, or designated as disabled
  - Must be a US citizen or lawful permanent resident
  - Annual gross sales of less than \$150 million
- **Application Process**
  - Full BEP Certification Application Process
  - Recognition Certification Process

<https://cei.illinois.gov/business-enterprise-program.html>

# Business Enterprise Program

## Recognition Certification Process

- **FastTrack Certification**
  - Chicago Minority Supplier Development Council
  - Mid-States Minority Supplier Development Council
  - Women's Business Development Center
  
- **Transportation Recognition Certification (TRC)**
  - Chicago Transit Authority (CTA)
  - Illinois Department of Transportation (IDOT)
  - METRA
  - PACE

**<https://cei.illinois.gov/business-enterprise-program.html>**

# Veteran Business Program

- Not less than 3% of the total dollar amount of State contracts, shall be established as a goal to be awarded to veteran owned or service-disabled veteran-owned small businesses.
- **Do I Qualify?**
  - At least 51% owned by veterans or service-disabled veterans living in Illinois
  - Valid DD214 is required
  - Annual gross sales of less than \$75 million
  - Home office in Illinois
- **Application Process**
  - Full Certification Application Process
  - Recognition Certification Process

<https://cei.illinois.gov/veterans-business-program.html>

# Veteran Business Program

- Recognition Certification
  - Cook County (Veteran/Services-Disabled Veteran Business Enterprise)
  - United States Department of Veteran Affairs-Center for Verification and Evaluations (CVE) VOSB/SDVOSB

**<https://cei.illinois.gov/veterans-business-program.html>**

# State Use

- The program provides employment opportunities for people working in qualified not-for-profit agencies by encouraging all agencies and universities to purchase products and services produced and provided by persons with significant disabilities.
- **Do I Qualify?**
  - Complies with Illinois laws governing private not-for-profit organizations
  - Meets the applicable Illinois Department of Human Services standards
  - Certified as a sheltered work center by the Wage and Hour Division of the US Department of Labor or is an accredited vocational program that provides transition services to youth between the ages of 14 ½ and 22 in accordance with individualized education plans under Section 14-8.03 of the School Code and that provides residential services at a child care institution, as defined under Section 2.06 of the Child Care Act of 1969, or at a group home, as defined under Section 2.16 of the Child Care Act of 1969.

<https://cms.illinois.gov/agency/stateuse.html>


# Small Business Program

- State agencies and universities have a goal to spend 10% of all spend on state contracts with Illinois small businesses.
- **Do I Qualify?**
- Illinois Business
- Not to exceed annual sales:
  - Wholesale - \$13 million
  - Retail - \$8 million
  - Construction - \$14 million
  - Manufacturing - 250 employees or less

<https://ipg.vendorreg.com>

# The Commission on Equity and Inclusion (CEI)

<https://cei.illinois.gov>



The screenshot shows the homepage of the Illinois Commission on Equity and Inclusion. At the top left is the 'ILLINOIS gov' logo. To its right are links for 'AGENCIES' and 'SERVICES'. Below this is a blue header with the State of Illinois seal and the text 'STATE OF ILLINOIS COMMISSION ON EQUITY AND INCLUSION'. Further right in the header are 'Contact Us' and 'Select Language' options, along with a search bar. A dark blue navigation bar contains links for 'Home', 'About Us', 'Business Enterprise Program (BEP)', 'BEP Council', 'Veterans Business Program (VBP)', and 'Meetings and Events'. The main content area features a photograph of a diverse group of people sitting in a row, some using laptops and tablets. Below the photo is a white box with an orange border containing the text: 'Welcome to the Commission on Equity & Inclusion'. Underneath this is the 'Our Vision' statement: 'Our Vision: The Commission on Equity and Inclusion (CEI) will assist minorities, women, persons with disabilities, and veterans, build their American dream by providing fair access to job and contracting opportunities with the State. CEI shall help the State enhance its workplace culture so people with diverse backgrounds, experiences, and ideas are respected and valued. CEI will champion all individuals pursuing...'



# <https://ceibep.diversitysoftware.com>

STATE OF IDAHO  
Commission on Equity  
and Inclusion

OUR MAIN SITE CONTACT SUPPORT

CEI BEP Diversity  
Management System

Portal Sign-In

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**BEP and/or VBP Certification**  
Search or join our database of registered and/or certified vendors

- BEP and/or VBP Certification Directory
- Apply for BEP and/or VBP Certification

**State Use - Sheltered Workshop Certification**

- SWS Certification Directory
- Apply for SWS Certification

**Account Access**  
Look up Vendor accounts or reset user passwords

- Account Lookup
- Forgot Password

**System Training**  
Learn how to fully utilize our system with a live trainer

- See Online Training Times

**Events**

- Events

**Additional Information**  
See the links below for additional information on our programs

- Whole Procurement Gateway (WPG) Registered Vendor Directory
- Procurement Opportunities
- Pathway to Procurement
- Rules & Statutes

**Outreach**  
Opportunities for vendor involvement

- View Outreach Opportunities

# Full Certification Documents

- BEP/VBP application affidavit signed by an authorized officer of the firm and notarized
- Most recent financial statement(s) including balance sheet (assets and liabilities)
- Most recent U.S. Federal Corporate and/or LLC Partnership Income Tax Return for the firm and all affiliates (including all attachments and schedules)
- Most recent U.S. Individual Federal Income Tax Returns for all owners (including all attachments and schedules)
- Bank signature cards and, for corporations, bank resolutions
- Copies of W-2 forms or 1099 forms for past (3) years for all owners and officer
- Evidence of citizenship/residency/legal permanency for all owners
- Evidence of ethnicity (Per 49 CFR Part 23) for all owners
- Resumes of work history including dates and responsibilities for all owners, officers, management employees, and supervisors/foremen
- Proof of contribution(s) by all owners to acquire stock in the company or start-up capital Evidence of contribution to gain ownership percentages is required to be provided for ALL owners., where the capital came from?

# Full Certification Documents

- Proof of purchase and or signed buy-out agreement(s)
- Equipment lease agreement(s) and/or inventory of equipment, including firm office equipment
- Real estate agreement(s), lease(s), property deed(s), or tax bill(s), including for home-based businesses and any warehouse rental(s)
- Cover page executed signature page, and scope(s) of work for the past (3) completed projects/contracts, purchase orders, and/or invoices verifying the performance of the requested service.
- Authorization to transact business in Illinois (SOS Letter of Good Standing current)
- MBE/DBE/WBE/PBE or SBA 8(a) certification(s) or denial(s) or statement of none (if applicable)
- Current license(s) (local, county, and state business license(s), permit(s), and professional license(s) issued to applicant firm, its owners and employees.
- Copies of all signed loan agreements and line of credit agreements (if applicable)
- Title(s) of automotive equipment for all vehicles used for business purposes or leased through the business (if applicable)

# Required Documentation based on Business Structure

## Corporation

- Articles of Incorporation (front & back pages, also any and all amendments) note: firm must be in good standing
- By-Laws of Corporation - Original Copy and copies of any and all Amendments of resolutions approved by the Stockholders and or Board of Directors as reflected on the Meeting Minutes.
- Copies of all stock certificates issued and canceled (front and back) and stock ledger.
- Minutes of the first stockholders' meeting and/or corporation's organizing minutes
- Minutes of first Board of Directors' meeting
- Most recent minutes of stockholders' meeting where the current board members were appointed
- Most recent minutes of Board of Directors' meeting where the current officers were appointed

## Limited Liability Companies (LLCs)

- Articles of Organization (front & back pages)
- Operating Agreement

## Sole Proprietorship

- Assumed Name Certification

## Partnership

- Partnership Agreement

# Renewal of Full BEP Certification

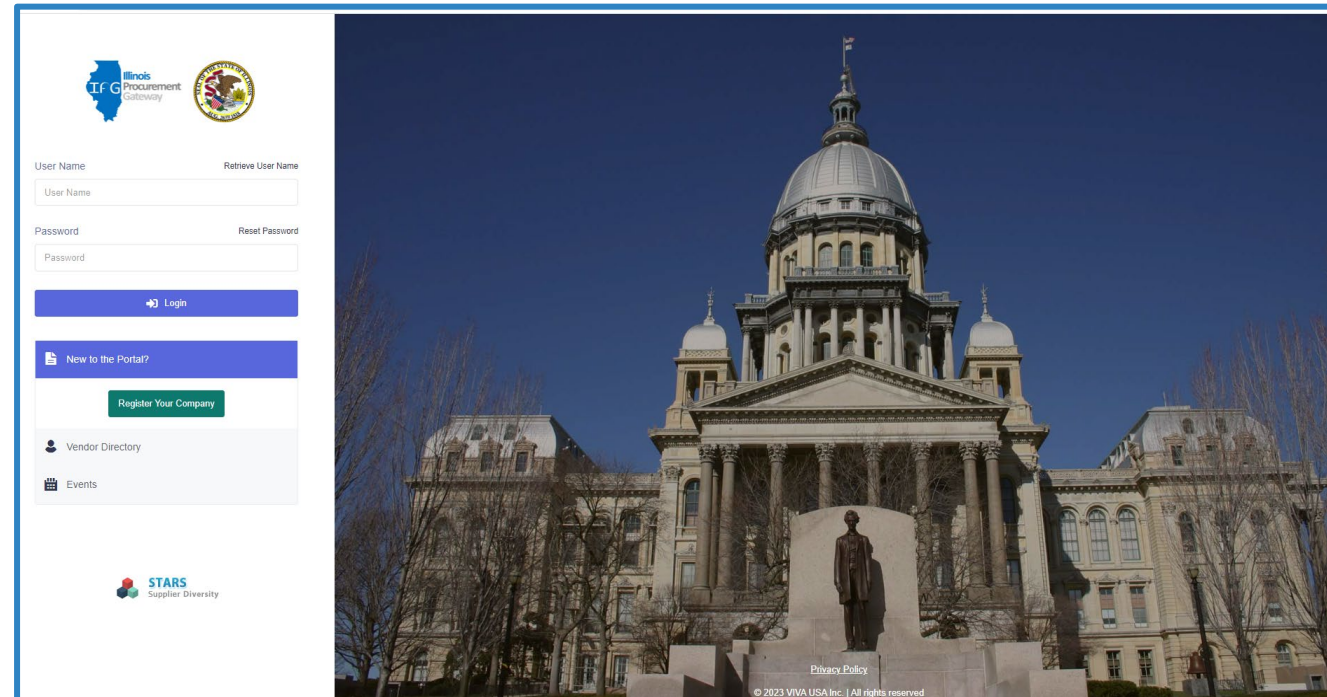
- BEP Certification Portal will send three renewal notices 90 days, 60 days and 30 days before the BEP certification expires
- The Annual No Change Affidavit (NCA Renewal) process only applies to vendors that have submitted a Full Certification in the prior year.
- All BEP certified vendors must update the company's information (if necessary) and submit a signed and notarized No Change Affidavit along with a current business license and current tax return to the BEP Certification Unit for review and approval.

## Certification Application Checklist

<https://cei.illinois.gov/content/dam/soi/en/web/cei/documents/BEP%20Certification%20Information%20Checklist.pdf>

# Illinois Procurement Gateway

<https://ipg.illinois.gov/>



# IPG Registration Requirement

## Items Needed for IPG Registration

- FEIN or SS Number
- IDHR Public Contract Number
- IL State Board of Elections Registration Number
- Authorized to do Business in Illinois
- Letter of Approval if registered with any of the following:
  - IL BEP
  - IL Veteran Business Program
  - IL Small Business Set-Aside
- Names of Company Owners
- Company Financial Information
- List of Board of Directors (Not-for-Profit)

# Procurement Bulletin Registration

- Register with the Illinois Procurement Bulletin for Public Institutions of Higher Education: <https://www.procure.stateuniv.state.il.us>

The screenshot shows the homepage of the Illinois Procurement Bulletin. At the top left is the logo for the Illinois Procurement Bulletin, Public Institutions of Higher Education. To the right are buttons for 'Create Account' and 'Log In'. Below the logo is a navigation bar with links for Home, Search, About the Bulletin, Vendor Resources, My E-bids, and News and Announcements. The main content area features a search bar with the text 'Search for procurement opportunities with Illinois public higher education institutions'. Below the search bar is a text input field labeled 'Keyword or procurement number:' with a yellow 'Search' button. To the right of the search bar are two icons: a calendar icon with the text 'Plan ahead - view potential upcoming opportunities' and an envelope icon with the text 'Get notices sent to you - sign up for email notifications'. Below the search bar is a link for 'Advanced Search'. The 'News and Announcements' section features a blue-bordered box with the title 'Bulletin Redesign 2023' and the date '07/20/2023'. The text in the box reads: 'We are happy to announce the launch of the newly redesigned Illinois Procurement Bulletin for Higher Education. This new version of the site will make it easier than ever for vendors to find procurement opportunities and participate in the procurement process.'



# Additional Requirements & Prohibitions

- **Procurement Communication Reporting Requirement**
  - State employees who have communications with potential vendors related to specific State procurements may have to report the communication on a publicly available website. (30 ILCS 500/50-39)
  
- **Political Contributions**
  - Businesses with bids, proposals and State contracts totaling more than \$50,000 annually are prohibited from making political contributions to candidates and current office holders for Governor and Lt. Governor. (30ILCS 500/50-37)

## IV. Resources

- Illinois Small Business Development Centers (SBDC)
  - <https://dceo.illinois.gov/smallbizassistance/beginhere/sbdc.html>

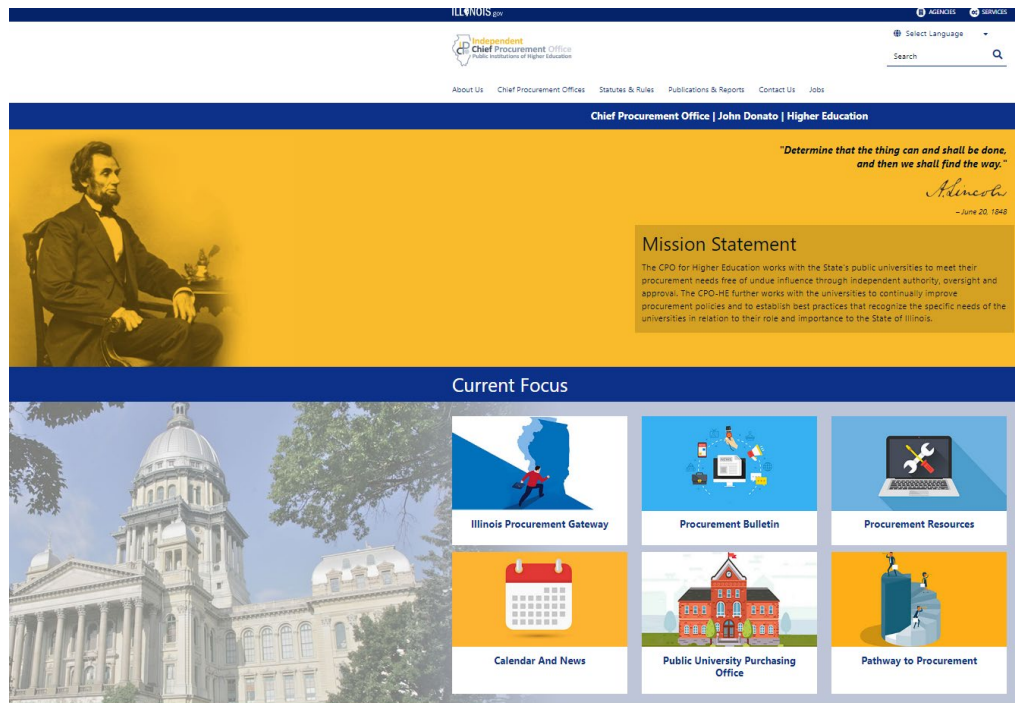


- Illinois Procurement Technical Assistance Centers (PTAC)
  - <https://dceo.illinois.gov/smallbizassistance/beginhere/ptac.html>



# IV. Resources

- Chief Procurement Office for Higher Education (CPO-HE)
- <https://cpo-highered.illinois.gov/>





# Independent Chief Procurement Office Public Institutions of Higher Education



The background features abstract, overlapping geometric shapes in various shades of blue, ranging from light sky blue to deep navy blue. These shapes are primarily located on the left and right sides of the slide, framing the central white space.

# Thank You