ATI Procurement Report

Campus Name: CSU Fresno

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 Moodle Website](http://ati.calstate.edu/) .

# 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 | The ATI Procurement Program Manager (ATIPPM) worked extensively throughout the year with the CSU ATI Procurement Standardization workgroup to help develop all aspects of the (standardized) CSU Accessible Procurement process. The ATIPPM was instrumental in architecting the structure of and developing/re-writing content for the Accessible Procurement section of the CSU Professional Development website.  | The campus will adapt/adopt the (standardized) CSU Accessible Procurement process during the pilot at Fresno State. The Pilot will address all success indicators in this goal/section with the exception of success indicator 1.7 (procard purchases.) |
| **Comments** |  |

| **Success Indicator** | **Status** | **Year Started** | **Worked on?****(Yes/No)** | **Will work on?****(Yes/No)** | **Comments** |
| --- | --- | --- | --- | --- | --- |
| * 1. Developed and published an Accessible ATI E&IT Procurement Plan
 | Defined | 2007 | Yes | Yes | The campus’ 2007 ATI E&IT Procurement Plan will be updated this year to reflect the work that has taken place since the original plan was established and to reflect recent CSU Standardized processes and guidelines. |
| * 1. Developed and published a document that defines what products are categorized as Section 508 E&IT procurements
 | Defined | 2007 | Yes | Yes | The information has been created. The status level will become “Established” once the information has been published to the campus’ Procurement and Accessibility websites. |
| * 1. Developed a procedure for procuring E&IT products at and above the current ATI procurement threshold
 | Defined | 2007 | Yes | Yes | The campus has drafted a procedure to determine the impact level of any given E&IT procurement. The campus protocol for the procedure to follow for each different impact level will be worked on this year. |
| * 1. Developed a documented rubric or process to determine the level/complexity of 508 evaluation that will be required for new procurements and/or renewals
 | Defined | 2007 | Yes | Yes | The campus has drafted a procedure to determine the impact level of any given E&IT procurement. The campus protocol for the procedure to follow for each different impact level will be worked on this year. |
| * 1. Developed a process for all competitive bid procurements that require an evaluation of Section 508 compliance
 | Defined | 2007 | Yes | Yes | The campus has drafted a procedure to determine the impact level of any given E&IT procurement. The campus protocol for the procedure to follow for each different impact level will be worked on this year, and will include specific processes to be followed for competitive bid procurements. |
| * 1. Developed a process for all non-competitive bid procurements that require an evaluation of Section 508 compliance
 | Defined | 2011 | Yes | Yes | The campus will adopt/adapt the recently established CSU Accessible Procurement process for non-competitive bid procurements. |
| * 1. Developed a process for all purchase card purchases that require an evaluation of Section 508 compliance
 | Not Started | N/A | No | No |  |
| * 1. Documented a process used to verify Voluntary Product Accessibility Templates (VPATs)
 | Defined | 2007 | Yes | Yes | The campus will adopt/adapt the VPAT Review protocols that were established in the recently established CSU Accessible Procurement guidelines. |

| **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 |  |  |  |  |
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# 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 | The campus expanded the frequency of meetings to discuss accessible procurement topics (from once a month to twice a month). Also the ATIPPM worked with CSU ATI Procurement Standardization workgroup to help establish recommended Roles and Responsibilities for the Accessible Procurement process for the CSU. | The campus will post the contact(s) for any campus questions related to Accessibility and procurement processes. Also, the campus will map the CSU recommended Roles and Responsibilities to existing staff and thereby help identify gaps in staffing necessary to fully implement the Accessible Procurement processes. |
| **Comments** |  |

| **Success Indicator** | **Status** | **Year Started** | **Worked on?****Yes/No** | **Will work on?****Yes/No** | **Comments** |
| --- | --- | --- | --- | --- | --- |
| * 1. Established a group that meets on a regular basis to discuss accessible procurement topics
 | Established | 2007 | Yes | Yes | The ATI Procurement subcommittee of the ATI committee meets on a regular basis. Additionally, committee members are encouraged to participate in the monthly systemwide ATI Procurement Community of Practice teleconferences.  |
| * 1. Identified contact person(s) and process for vendors, purchase requestors, and staff to ask questions about procurements
 | Defined | 2007 | Yes | Yes | The information has been created. The status level will become “Established” once the information has been published to the campus’ Procurement and Accessibility websites. |
| * 1. 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 vendor on accessibility questions? Who does the accessibility evaluation of the product?)
 | Defined | 2007 | Yes | Yes | Recommended roles and responsibilities for the accessible procurement process were recently established by the CSU ATI standardization workgroup. The campus will use these guidelines to map each component of the process to existing staff assignments. The mapping process will help identify staffing gaps that would present challenges to being able to complete each component in the accessible procurement process.  |

| **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 |  |  |  |  |
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# 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 | The ATIPPM worked with the CSU ATI Procurement Standardization workgroup to define the very limited role exceptions should play in the EIT procurement process. | The campus will post the formal process to request exceptions. The follow-up process for both vendors and purchase requesters will be also be posted. |
| **Comments** |  |

| **Success Indicator** | **Status** | **Year Started** | **Worked on?****Yes/No** | **Will work on?****Yes/No** | **Comments** |
| --- | --- | --- | --- | --- | --- |
| * 1. Established a process for granting exemptions
 | Initiated | 2007 | No | Yes | The campus will establish a process of granting exceptions (not exemptions) for procurements where it is determined to be appropriate. |
| * 1. Documented the exemption process, posted it on public website, and have communicated process to campus
 | Initiated | 2014 | No | Yes | The campus will document and post the process to request exceptions (not exemptions) on the Procurement and Accessibility websites |
| * 1. Documented a process that ensures that supplementary accommodations can be put in place when exemptions are warranted
 | Initiated | 2014 | No | Yes | The campus will document and post the process to ensure supplementary accommodations (accomplished using EEAAPs) can be provided proactively, for situations where exceptions (not exemptions) are granted and when an EEAAP is required given the impact-level of a purchase. |
| * 1. Established a follow-up process for communicating with vendors and purchasers when a procurement is moved forward without total resolution of the accessibility status of the product
 | Defined | 2012 | Yes | Yes | The campus currently has an informal follow-up process established, both for purchasers and for vendors, for select, high-impact procurements. The follow-up process for purchasers consists of advising about the requirement to provide equally effective alternate access upon request. The follow-up process for vendors includes providing feedback about existing gaps and gaining a commitment to Accessibility Roadmap(s). |

| **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 |  |  |  |  |
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# 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.** | Defined | The campus informally used the CSU EEAAP form and guidelines for various procurements during the year.  | The formalized campus EEAAP process will be rolled out as a part of the CSU Accessible Procurement pilot. |
| **Comments** |  |

| **Success Indicator** | **Status** | **Year Started** | **Worked on?****Yes/No** | **Will work on?****Yes/No** | **Comments** |
| --- | --- | --- | --- | --- | --- |
| * 1. Documented a process that outlines when an equally effective access plan is necessary
 | Defined | 2007 | Yes | Yes | The campus will document our current informal process which outlines when an Equally Effective Access Plan is necessary. The campus’ process is based upon the guidelines for creating EEAAPS (as provided in the CSU Accessible Procurement process.) |
| * 1. Established a process with roles assigned for all parts of creating an equally effective access plan
 | Defined | 2013 | Yes | Yes | The campus has piloted a process for a couple procurements. The process will be finalized this year and will include determining the roles assigned to all parts of creating an Equally Effective Access Plan (EEAAP) |
| * 1. Established a process that tracks how many equally effective access plans have been created
 | Defined | 2014 | Yes | Yes | The campus has updated the Procurement requisition database to include fields to capture and track the creation, approval and modification of Equally Effective Access Plans (EEAAPs) |
| * 1. Established a process to ensure that accommodations were provided
 | Not Started | N/A | No | No |  |

| **Area(s) of Requested Collaboration for Equally Effective Access Plans** | **Indicator Number** | **Assistance Requested?****Yes/No** | **Assistance** **Offered?****Yes/No** | **Comments** |
| --- | --- | --- | --- | --- |
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# 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.** | Initiated | The ATIPPM worked extensively throughout the year with the CSU ATI Procurement Standardization workgroup to develop the purchasing process that the campus’ training will be based upon. | Training will be established and deployed for purchase requesters and Buyers as a part of the CSU Accessible Procurement Pilot. |
| **Comments** |  |

| **Success Indicator** | **Status** | **Year Started** | **Worked on?****Yes/No** | **Will work on?****Yes/No** | **Comments** |
| --- | --- | --- | --- | --- | --- |
| * 1. Established and deployed new employee orientation training materials that provide overview of Section 508 requirements and where to get more information
 | Not Started | N/A | No | No |  |
| * 1. Established and deployed training program for purchase requestors
 | Not Started | N/A | No | Yes | Training materials for Purchase Requestors will be established and deployed as a part of the CSU Accessible Procurement Pilot at Fresno State |
| * 1. Established and deployed training program for technical evaluators
 | Not Started | N/A | No | No |  |
| * 1. Established and deployed training program for procurement staff
 | Initiated | 2007 | No | Yes | Training materials for Procurement Staff (Buyers) will be established and deployed as a part of the CSU Accessible Procurement Pilot at Fresno State |
| * 1. Established and deployed training for all purchase card holders
 | Not Started | N/A | No | No |  |
| * 1. Established and deployed training for Section 508 compliance officer
 | Defined | 2013 | Yes | Yes | The campus does not have anyone who is designated as the “Section 508 Compliance Officer.” The campus ATI Designee for Procurement (ATIPPM) regularly receives training through participation in webinars, national collaboration opportunities, and by attending national conferences on the topics related to Accessibility and Procurement. |
| * 1. Collected feedback from training (effectiveness, knowledge retention, etc.)
 | Not Started | N/A | No | Yes | Feedback will be collected for all training that is deployed during the CSU Accessible Procurement pilot at Fresno State |
| * 1. Established methods for retraining individuals and departments to refresh knowledge of the E&IT procurement process
 | Not Started | N/A | No | No |  |

| **Area(s) of Requested Collaboration for Training** | **Indicator Number** | **Assistance Requested?****Yes/No** | **Assistance** **Offered?****Yes/No** | **Comments** |
| --- | --- | --- | --- | --- |
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# 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 | The ATI Communications subcommittee was formed and began working on developing outreach efforts for all areas of ATI including Procurement. | There will be outreach efforts and communications developed related to the campus’ role in the CSU Accessible Procurement pilot, in addition to ongoing ATI awareness communications which will be developed by the ATI Communications subcommittee. |
| **Comments** |  |

| **Success Indicator** | **Status** | **Year Started** | **Worked on?****Yes/No** | **Will work on?****Yes/No** | **Comments** |
| --- | --- | --- | --- | --- | --- |
| * 1. Created an outreach program to explain E&IT procurement exemptions and where to get more information
 | Not Started | N/A | No | Yes | The process of requesting an exception (not exemption) will be developed and posted on Procurement and Accessibility websites as a part of the CSU Accessible Procurement pilot. Given that granting exceptions should be rare and requesting exceptions will not be encouraged, the campus will not make any special effort (e.g. “outreach”) to communicate the process. |
| * 1. Identified recurring vendors and educated them on Section 508 accessibility requirements (i.e., Renewals, maintenance agreements and ongoing purchases)
 | Not Started | N/A | No | No |  |
| * 1. Established an ongoing general campus communication that promotes E&IT procurement awareness
 | Initiated | 2014 | Yes | Yes | The ATI Procurement subcommittee will work with the ATI Communications subcommittee to develop a plan for ongoing campus communications to promote awareness of ATI Procurement. |

| **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 |  |  |  |  |
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# 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 | The campus began capturing statistical information about EIT purchases and Accessibility reviews. | More data will be tracked this year including tracking information about EIT review activity by impact level and EEAAP creation statistics. |
| **Comments** |  |

| **Success Indicator** | **Status** | **Year Started** | **Worked on?****Yes/No** | **Will work on?****Yes/No** | **Comments** |
| --- | --- | --- | --- | --- | --- |
| * 1. Evaluated the compliance and completeness of procurements that have exemptions
 | Not Started | N/A | No | No |  |
| * 1. Metrics exist for each of the areas of E&IT procurement (procedures, staffing, exemptions, equally effective access plans, experience, training, and outreach)
 | Initiated | 2013 | Yes | Yes | The campus has begun to track information about EIT procurements. Information is being tracked to capture the number of orders that are classified as EIT, the number of EIT reviews that have been begun/completed, and the number of EEAAPs that have been created. |
| * 1. Established metrics has led to tangible improvements in the quality and/or effectiveness of the procurement process
 | Not Started | N/A | No | No |  |

| **Area(s) of Requested Collaboration for Evaluation & Monitoring** | **Indicator Number** | **Assistance Requested?****Yes/No** | **Assistance** **Offered?****Yes/No** | **Comments** |
| --- | --- | --- | --- | --- |
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# Experience/Implementation

| **Goal** | **Goal Status** | **Key Accomplishments** | **Key Plans** |
| --- | --- | --- | --- |
| **Campuses have sufficient experience and expertise in completing E&IT procurements.** | Initiated | The total number of reviews of vendor-supplied Accessibility information increased from 0.5% to 1.7% (from 7 to 23.) | The total number of Accessibility reviews should increase this year, especially given the campus’ role/participation in the CSU Accessible Procurement pilot.  |
| **Comments** |  |

| **Success Indicator** | **Numeric value for the 2010/2011 year** | **Percent value for the 2010/2011 year (# of indicator over total # of E&IT procurements)** | **Comments** |
| --- | --- | --- | --- |
| * 1. Number and percent of E&IT products on which Section 508 compliance was tested
 | 0 | 0% (0/1343) |  |
| * 1. Number and percent of E&IT products on which user accessibility testing was conducted
 | 0 | 0% (0/1343) |  |
| * 1. Number and percent of verifications of Voluntary Product Accessibility Templates (VPATs) conducted
 | 23 | 1.7% (23/1343) |  |
| Success Indicator 8.4 go to next table |  |  |  |

| **Success Indicator** | **# Sole Brand** | **# undue burden** | **# national security** | **# commercial non availability** | **# back office** | **# net cost increase** | **# fundamental alteration** |
| --- | --- | --- | --- | --- | --- | --- | --- |
| * 1. Number of E&IT procurements that were granted an exemption(s)
 | #0 | #0 | #0 | #0 | #0 | #0 | #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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| --- | --- | --- | --- |
| **Name** | **Title** | **Email Address** | **Phone Number** |
| Tom Siechert | ATI Procurement Program Manager | tsiechert@csufresno.edu | 559-278-5023 |
| Brian Cotham | Director of Procurement | bcotham@csufresno.edu | 559-278-2893 |