



## **Agency Statewide Contract Use Analysis**

The purpose of analyzing an agency's use of statewide contracts is to identify opportunities to use Statewide Contracts held by minority, woman, veteran owned businesses and small businesses, and to identify where such a contract does not exist to justify using a certified business as an alternative.

1. Download Statewide Contract use data into an Excel spreadsheet (CSV for Excel):

<u>Statewide Contract (Master Contract) Sales Data by Customer, Contract, Vendor | Data.WA |</u> <u>State of Washington</u>

<b>)</b>	Data.WA.go	vc		Home	GetStarted!	Discuss Learn	0 🖬   Q	Sign In			
	by Custor Procurements And DES is publishing	Contracts Statewide Contract (Master by vendors and is reported l	ter Contract) Sales endor Contract) spend as data becomes oy contract and customer. Include	available.	The	Visualize V Updated July 26, 2023	Download State Contract) Sales Vendor Download Statew	wide Contract (Master × Data by Customer, Contract, ide Contract (Master Contract) Sales , Contract, Vendor for offline use in			
	About this Da	taset	CSV CSV for Excel								
	Updated	022	Temporal			Additional Formats CSV for Excel (Europe) TSV for Excel					
	July 20, 2	023	Period of Time	Calendar Year 2015 to current			RDF	XML			
	July 26, 2023 Data Last Updated Metadata Last Update		Posting Frequency	Quarterly			RSS				
	July 26, 2023	July 26, 2023	Topics								
	Date Created July 18, 2016		Category Procurements and Contracts								
	Views	Downloads	Tags		contracts, contra de contract	acts, procurement, spen	d, vendor,				
	12.3K	3,513									

**Column Headers and Their Meanings** 

Customer Type	Category of the entity (State agency, city government, not-for-profit, etc.)						
Customer Name	The agency or entity (e.g. Department of Corrections, University of						
	Washington, Seattle Children's Hospital)						
Contract Number	Statewide Contract Number assigned by DES						
Contract Title	Category of spend						
Vendor Name	The business used for that purchase						
Calendar Year	The annual period in which the entity made the purchase						
Q1 Sales – Q4 Sales	The calendar quarter in which the entity made the purchase						
OMWBE	Is the vendor certified by OMWBE? Yes or No						
Vet Owned	Is the vendor a veteran-owned business? Yes or No						
Small Business	Is the vendor a small business? Yes or No						
Diverse Options	Is there an OMWBE certified business available on the state contract? Yes						
	or No						



STATEWIDE CONTRACTS

- 2. Filter for your agency and the desired analysis period (e.g. the previous three years for a baseline, the previous quarter for maintenance).
  - a. Select the Data menu and click on the Filter icon.
  - b. Select your agency in Column B and the desired period in Column F.

A1         *         X         fr         Customer Type           A         B         C         D         E         F         G         H         I         J         K         L         M         N           1         Custom*         Contra(*         Contra(*         Vendo(*         Calend *         Q1 Sale*         Q3 Sale*         Q4 Sale*         OMWB*         Vet OV*         Small B*         Diverse**         C           2         Higher Ed YAKIMA V         111         Fertilizers WILBUR-E         2015         0         0         1,032         N <th colspan="10"></th> <th></th>															
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- 3. Sort by the "Diverse Options" column to find any purchases that do not have a diverse option (value of "N") then cut/paste them into a separate tab or another spreadsheet for later use.
- 4. Filter for "N" in the appropriate remaining columns to filter for OMWBE, Vet, and Small Business.

The remaining purchases represent situations in which a certified or small business was not used though one was available.

- 5. Sort the purchases by Contract Title.
- 6. Prioritize the purchases for review (e.g., by dollar amount, frequency of purchases, likelihood of upcoming similar purchases)
- 7. Review the list (with the purchaser, as appropriate and possible).
  - a. Consider the following:
    - i. Was the purchaser aware of the certified or small business options?
    - ii. Were the certified or small business options unable to fulfill the order?
    - iii. Are similar purchases upcoming and could a certified or small business meet the purchaser's needs?





- b. Follow up as needed.
  - i. Notify DES if a certified or small business vendor is consistently unable to deliver or meet the needs.
  - ii. Assist DES with identifying gaps in vendor availability in contract categories and agency needs.
  - iii. Retain notes as a reference for future analysis.
- 8. Sort the purchases that do not have a diverse option and prioritize them for review (e.g., by dollar amount, frequency of purchases, likelihood of upcoming similar purchases).
- 9. Search for minority, woman, veteran owned businesses that can provide the goods and services needed. If you find one:
  - a. You can complete a direct buy for amounts under \$40,000 (note that non-diverse or small businesses have a direct buy limit of \$30,000).
  - b. For amounts over \$40,000, you can complete the purchase outside of the statewide contract but you will have to do a competitive solicitation.

Retain documentation of your reasoning, such as "identified a minority/woman owned/veteran/small business because one was not available on the current Statewide Contract," and your search results as justification for not using a Statewide Contract (see Outreach guidance for more information on searching for businesses: <u>Targeted Industry</u> <u>Outreach Plan</u>).