



State of Illinois Commission on Equity and Inclusion
Business Enterprise Program
100 W. Randolph St., Suite 4-100, Chicago, IL 60601
www.cei.illinois.gov

FY2023 BEP COMPLIANCE PLAN INSTRUCTIONS

The Business Enterprise Program's (BEP) Fiscal Year 2023 Compliance Plan is composed of three Parts. **Your institution is responsible for completing all three Parts and submitting them to BEP by January 31st, 2023.** Use ONLY the designated templates for Fiscal Year 2023 compliance reporting as this year's template has changed. Use of prior years' templates will not be accepted.

PART I: Commitment to Comply with BEP Act

Part I is the State Agency, Public Institution of Higher Education, and Community College commitment to BEP. By statute, the state agency directors and public institution of higher education and community college presidents are held responsible for compliance with the BEP Act. Those commitments are detailed in this component of the Compliance Plan. Please take a screenshot of submission receipt for your records.

Complete the Institution's Commitment to Comply with the BEP Act here:

<https://forms.office.com/g/K5GkEjRjvY>

PART II: Compliance Plan Detail Workbook

Part II must be emailed to CEI.BEP.Compliance@Illinois.gov as an attachment and writable Excel workbook. Do **NOT** password protect these documents. Community Colleges must return their Part II forms to both CEI.BEP.Compliance@Illinois.gov and the Illinois Community College Board ICCB.Finance@illinois.gov

Part II is the institution's budget detail worksheet. There have been revisions to the template for FY 2023. Further information on the updates made to the worksheet are detailed below. **ONLY** utilize the FY 2023 worksheet attached or on the [CEI/BEP website](#) under the appropriate Procuring State Institution Requirements.

At the top of the worksheet, enter the institution's name and identification number. The worksheet is arranged in the budgetary format of Major Object Codes and Detailed Object Codes (DOC) as defined by the Office of the Comptroller.

The **Part II** template for Community Colleges contains alternate coding for their detailed expenditure categories and is not to be utilized by State Agencies and Public Institutions of Higher Education (PIHE). The Community College reporting template requires only one expenditure object code category identified as the "FM Code" on the community college template.

Row headings on the worksheets shaded in yellow identify the Major Object Expenditure Categories or FM Code categories. No dollar entries are permitted in these

lines. Entries are only allowed in lines that reference a specific Detail Object Code (DOC) or FM Code.

If the institution requires an additional expenditure category not already identified, insert the appropriately on the template. Both templates have a column that identifies each DOC or FM Code with a brief description of the expenditure category.

The “**Allowable Exemption**” Column is informational only and populated with a “YES” or “NO” that denotes each specific Detail Object Code / FM Code as an allowable or non-allowable exemption from the BEP goal. All expenditure codes ruled by the BEP Council as an allowable exemption are shaded in blue and identified with a “YES” in this Column.

In the “**Total Dollar Allocation**” Column, enter the dollar amount from all funding sources that represents the dollars allocated from your total budget for each Detail Object Code or FM Code. Enter the full dollar amount with no abbreviations. For example, if the amount is \$250 million, enter 250,000,000.

The “**Total Dollar Allowable Exemption**” Column identifies the total exempted amount of the total dollar allocation in each expenditure code. The “**Total Dollar Allocation**” amount and the “**Total Dollar Allowable Exemption**” amount must be equal. For your convenience, the dollar amount entered in the “**Total Dollar Allocation**” Column will automatically be populated into the “**Total Dollar Allowable Exemption**” Column. This formula applies to all DOCs and FM Codes that are only designated as allowable exemptions with a YES in the “**Allowable Exemption**” Column. It is unnecessary to enter any reason for the allowable exemptions in the last Column of the worksheet “**Requested Exemption Explanation**”.

Report any allowable [JCAR Section 10.22](#) exemption(s) the institution has identified in a DOC or FM Code line designated as a non-allowable exemption in the “**JCAR 10.22 Reference**” Column. The exemption reference categories for this Column are obtained from the “**JCAR 10.22 Reference**” tab of the template.

Report the exemption amount in the “**JCAR 10.22 Amount**” Column. These “JCAR” Columns only apply to the DOC Codes and FM Codes that are identified with a “NO” in “**Allowable Exemption**” Column. If the JCAR 10.22 exemption is contained within a DOC or FM Code line already identified as an allowable exemption in the “**Exemption Allowed**” Column, do not enter cite reference(s) nor amount in Columns “**JCAR 10.22 Reference**” and “**JCAR 10.22 Amount**”.

If more than one JCAR reference is identified within the same DOC or FM Code line, list all the references in this column that are applicable; for example, *1D, 2E*.

The Column “**Total Dollar Requested Exemption**” identifies the total, or partial exempted amount of the total dollars allocated for that DOC.

New: The “**Exemption Category**” added for FY 2023 reporting defines categories/reasons for requesting an exemption. This is a drop-down Excel function with eighteen selections available. Identify the closest option available for the exemption request. The worksheet tab “Exemption Categories” lists the exemption selections available and offers some additional explanation information that should normally be identified in the “**Requested Exemption Explanation**” Column.

The institution must provide an explanation for the request for the exemption in the “**Requested Exemption Explanation**” Column. Be precise in defining the rationale for exempting the specified amount. The Exemption Category selection made in the previous column will assist in the explanation - reference in the “Exemption Categories” tab. If the explanation is considered by the BEP Council as vague or unclear, the institution will be required to produce more detailed information surrounding its request for the exemption. The BEP Council will either approve or deny these requests based on the explanations, including BEP vendor availability.

Some agencies may define their budget allocation dollars differently, utilizing alternate Major Object Code designations. In these cases, add or modify appropriate cells/lines to this worksheet as necessary to identify these differences.

Considering Detail Object Code 1182 and potentially FM Codes 520** and 529*, only the administrative costs are not considered as an allowable exemption. This applies only for institutions responsible for procuring the administrative components of state employee group health insurance policies.

PART III: Institution Contact Form

Part III captures the institution’s contact information for the personnel identified on this template.

The institution Contact Form must be submitted here:
<https://forms.office.com/g/mkKXHfJyaJ>

If you have any questions, please contact your assigned BEP Compliance Officer for assistance.

* * * * *