



State of Illinois
Central Management Services
Business Enterprise Program
CONTRACT GOAL SETTING
MANUAL

FY 2021

Version 20.0

Revised 2/8/21



Table of Contents

SECTION I – INTRODUCTION	2
Contract Goal Setting	3
Contract Specific Goals	3
Summary of the Manual	5
SECTION II – DETERMINING THE SCOPES OF WORK.....	6
SECTION III – IDENTIFYING THE INDUSTRY NIGP CLASSIFICATION CODES	6
SECTION IV – ESTIMATING CERTIFIED BEP AVAILABILITY	7
SECTION V – SETTING CERTIFIED BEP CONTRACT GOALS.....	8
Section Instructions	9
SECTION VI – GOAL ANOMALIES.....	26
SECTION VII – FINALIZING CERTIFIED BEP GOAL SETTING	26
APPENDIX A – GOAL SETTING FORMS	27

SECTION I – INTRODUCTION

With the State of Illinois' purchases in the billions of dollars in goods and services annually, it is important to the State that all businesses have full and fair access to State contracting and subcontracting opportunities. To reduce barriers to participation by firms owned by minorities, females and persons with disabilities, the State has adopted the Illinois Business Enterprise Program (BEP) (30 ILCS 575). Firms owned by minorities, females, and persons with disabilities, which meet the criteria set forth in the BEP Act, are eligible for certification with this Program. To improve, standardize and clarify the process to set contract specific BEP goals, the State of Illinois has developed this manual to be used to outline the contract goal setting process.

While the State has an aspirational goal to spend at least 20% of its total dollars with firms certified through BEP, the State determines its goals for each contract on an individual contract basis. The goal on each contract is based on the availability of BEP certified vendors against the overall availability of vendors within certain market sectors. This means the goal for a particular solicitation must be "narrowly tailored" to the State's needs, to reflect the industry or product markets needed to perform the contract. The goal must be based on the availability of minority, women, and persons with disabilities-owned firms that can perform commercially useful functions in the scope(s) of work of the contract. The contract goal setting process will involve multiple State personnel from all State agencies, public institutions of higher education, and community colleges. At the procuring institution that issues the contract, the Procurement Officer (APO) will perform the initial goal setting tasks, using the Central Management Services (CMS) **BEP Project Goal Setting Form** attached and detailed in later sections of this manual. The final recommended and authorized BEP goal will be determined by the BEP Compliance Officer (BEP-CO) using the **BEP Contract Goal Setting Review Form**. The form will be provided to the Procurement Officer (APO) and the BEP Liaisons electronically by BEP.

Contract Goal Setting

The State achieves its overall statewide goal of 20% through the many different contracts procured annually. The overall statewide goal is comprised of the aggregated amounts of all the separate contract goals, as processed through the state fiscal year.

The goal set for each individual procurement is based on the scope(s) of work for the contract, with these scopes documented on the State's **BEP Project Goal Setting Form**. Each scope of work will be evaluated for a potential goal. The availability of certified BEP firms that provide a commercially useful function within these scopes of work, must be determined. The overall contract goal is the cumulative amount of the availability of certified BEP firms in each percentage weighted scope of work on the **BEP Project Goal Setting Form**.

NOTE: If there are no anticipated NIGP CLASS Item Codes identified for the procurement that can be subcontracted, no contract goal will be set. In this case, you can either submit the BEP Project Goal Setting Form illustrating no BEP vendor availability, or you may submit a Decision Memorandum to your BEP Compliance Officer. Please submit one or the other, not both.

The use of NIGP CLASS Item Codes that end with "00" are prohibited in the goal setting process and not accepted by the CPO's BidBuy System nor in BEP's Certification System and Diversity Contract Monitoring System (DCMS).

Contract Specific Goals

Contract specific goals establish the amount of certified BEP participation that can be reasonably achieved based on the scopes of work identified for the contract. Determination of a contract goal involves the following steps:

- Determine all the scopes of work for the contract.
- Identify each NIGP CLASS Item Code that best represents each scope of work.
- Identify the individual number of BEP certified vendor available in each NIGP CLASS Item Code.

- Weight each scope of work as a fraction of the total contract dollars in each NIGP CLASS Code to determine the contract goal by either a dollar or percentage value.

Determine the Scopes of Work: When preparing a contract for procurement, the institution must first determine the scopes of work involved and the budgeted dollar amounts or percentage scope for each one of those goods or services. For example, a contract for information technology services may involve various scopes of work such as the purchase of software and hardware materials, programming, cabling, creation of user manuals, reporting, etc.

Identify the NIGP CLASS Item Code: The State of Illinois uses the NIGP Coding System for state procurements and is also used in the BEP goal setting process. Both the numerator and denominator of the goal setting formula require search results based on the five-digit NIGP CLASS Item Code. The NIGP CLASS Item Code(s) used in the goal setting formula must be made available to all bidding primes on the solicitation. They are a necessary component in completing the Utilization Plan Version 20.0 required by the bidding vendors.

Identify Certified BEP Availability: The [BEP certification portal](#) contains a directory of certified BEP firms with their associated NIGP CLASS Item Code designations. Grouped by NIGP CLASS Code, the total number of individual (unique/non duplicated) BEP certified firms in an NIGP CLASS Item Code will be divided by the total number of individual (unique/non duplicated) firms in the BidBuy directory in the same NIGP CLASS Item Codes, to determine availability.

Determine Weighted Contract Goal Setting: Weighting is the method of determining the portion of the overall contract cost, that can be applied to the separate and specific NIGP CLASS Code scopes of work for the contract. The individual number of certified BEP vendors for each

NIGP CLASS Item Code scope is weighted by the contract dollar percentage value for that NIGP CLASS Code scope. The cumulative percentage amount of the availability for each NIGP CLASS Item Code calculates the overall contract goal.

Summary of the Manual

This Manual contains four sections that describe each step required in establishing contract goals and provides specific instructions for each step. An Appendix containing an example of the **BEP Project Goal Setting Form** is to be used in the new process. The Excel version of the **BEP Project Goal Setting Form** will accompany this Manual.

In addition to the form provided, you will be using the following two databases to acquire the formula values needed to set the goal:

- BEP certified vendor online directory to establish the formula's **numerator**.
<https://cms.diversitycompliance.com/>
- State of Illinois BidBuy vendor database to establish the formula's **denominator**.
<https://www.bidbuy.illinois.gov/bsol>

Section II – Determining the NIGP CLASS Item Codes Scope(s) of Work: This Section will discuss the determination of each of the NIGP CLASS Item Code scopes of work for the individual contract and the approximate dollar percentage value of each NIGP CLASS Code scope.

Section III – Identify the NIGP CLASS Item Codes: This Section will explain how to identify the best **NIGP CLASS Item Codes** for each scope of work identified for the contract.

Section IV – Determining BEP Availability: This Section will explain how to determine the potential availability of certified BEP firms for each NIGP CLASS Code.

Section V – Setting the Goal: This Section will provide instructions for establishing a contract specific goal and completing the **BEP Project Goal Setting Form** that calculates the BEP goal.

Section VI – Goal Anomalies: This Section addresses goals higher than 20% resulting from the formula calculations.

Section VII – Finalizing BEP Goal Setting: This Section provides instructions for finalizing the goal setting process.

Appendix A – BEP Project Goal Setting Form: BEP Project Goal Setting Form

This form is depicted in this manual for your reference; you will receive an Excel version of the form to use in the contract goal setting process. Please note, you must use the State of Illinois' BidBuy Procurement System as the official source for the contract goal-setting denominator in the formula.

SECTION II – DETERMINING THE SCOPES OF WORK

To set contract goals for BEP participation, the first step is to identify the NIGP CLASS and CLASS Item Codes for each component of the scope of work of the contract and the approximate dollar or percentage value of the scope of work associated with each NIGP CLASS Code. You also need to determine the amount of weight each scope carries in relation to the total dollar value of the contract. Determine the most accurate dollar or percentage weight value for each NIGP CLASS Code to enter on the **BEP Project Goal Setting Form**. The procuring institution identifies the required NIGP CLASS Item Codes representing the scopes of work of the contract.

SECTION III – IDENTIFYING THE INDUSTRY NIGP CLASSIFICATION CODES

Once the procuring institution has determined all the scopes of work for the procurement broken out by each NIGP CLASS Item Code, with the approximate dollar and percentage value for each of the three-digit grouping of the NIGP CLASS Code scope, the Procurement Officer (APO) will enter this information on the **BEP Project Goal Setting Form**. Like NIGP CLASS Item codes will be grouped together on the form by the first three digits of the NIGP CLASS Code. **The total number of individual BEP vendors and the total number of individual BidBuy vendors for each like three-digit NIGP Class Code on the form will be recorded on the row of**

the first NIGP CLASS Item Code listed in the group. The APO will identify all the appropriate five-digit NIGP CLASS Item Codes in the column labeled “NIGP CLASS ITEM CODE”. There may be one or many five-digit NIGP CLASS Item Codes listed under one three-digit NIGP CLASS Code required for all the goods or services of the contract.

SECTION IV – ESTIMATING CERTIFIED BEP AVAILABILITY

After the APO has determined and identified all the NIGP CLASS Item Codes for the scopes of work of the contract, they will now determine the availability BEP certified firms for the contract. BEP availability is the aggregate number of all individual/not duplicated BEP certified firms in each NIGP CLASS Item Codes included under the main three-digit NIGP CLASS Code. This sum of these individual BEP vendors within the same NIGP CLASS Code is divided by the sum of individual BidBuy firms identified in those same NIGP CLASS Codes. This calculation is represented by traditional division formula using a numerator and a denominator: a/b . This calculation is repeated for each NIGP CLASS Code on the goal setting form. The aggregate of each calculation on the goal setting form represents the overall goal for the contract.

- The numerator, a , is the total number of all individual/not duplicated BEP certified firms grouped under the first three-digits of the NIGP CLASS Code identified on the **BEP Project Goal Setting Form**. This data is obtained from the BEP Certification portal.
- The denominator, b , is the total number of all individual/not duplicated BidBuy firms grouped under the first three-digits of the NIGP CLASS Code identified on the **BEP Project Goal Setting Form**. This data is obtained from the State’s procurement system BidBuy.
- The estimated availability is a divided by b ; multiplying the result by 100 yields the result as a percentage.

For example, if there are 23 (*a*) individual BEP certified firms in the NIGP CLASS Code for plumbing services and 210 (*b*) individual BidBuy firms in the same NIGP CLASS Code for plumbing services, the formula would be:

- a/b
- $23/210 = 0.10952$
- $0.10952 \times 100 = 10.95\%$
- Estimated availability is 11%

For this type of calculation, the number would be rounded up or down depending on the first digit to the right of the decimal. If the first digit is 5 or above, round up one; if the first digit is 4 or below, round down to the whole number to the left of the decimal. The **BEP Project Goal Setting Form** performs all the necessary calculations.

NOTE: If there are fewer than 3 BEP certified vendors identified in the NIGP CLASS Item Code scope of work, the worksheet formula will not establish a BEP goal for that scope.

SECTION V – SETTING CERTIFIED BEP CONTRACT GOALS

The contract goal is determined by adding the Scope Goal of each of the weighted NIGP CLASS Code categories identified on the goal setting form. For example, if there are three NIGP CLASS Code Scope Goals calculated on the **BEP Project Goal Setting Form**, all three are added to create the overall contract goal.

Estimated BEP certified vendor availability was determined in Section IV by dividing the total number of individual BEP certified vendors (*a*) by the total number of individual BidBuy firms (*b*) in the same NIGP CLASS Code. The final step of the calculation multiplies the percentage weight of the scope assigned to that specific three-digit NIGP CLASS Code designated by the APO.

Section Instructions

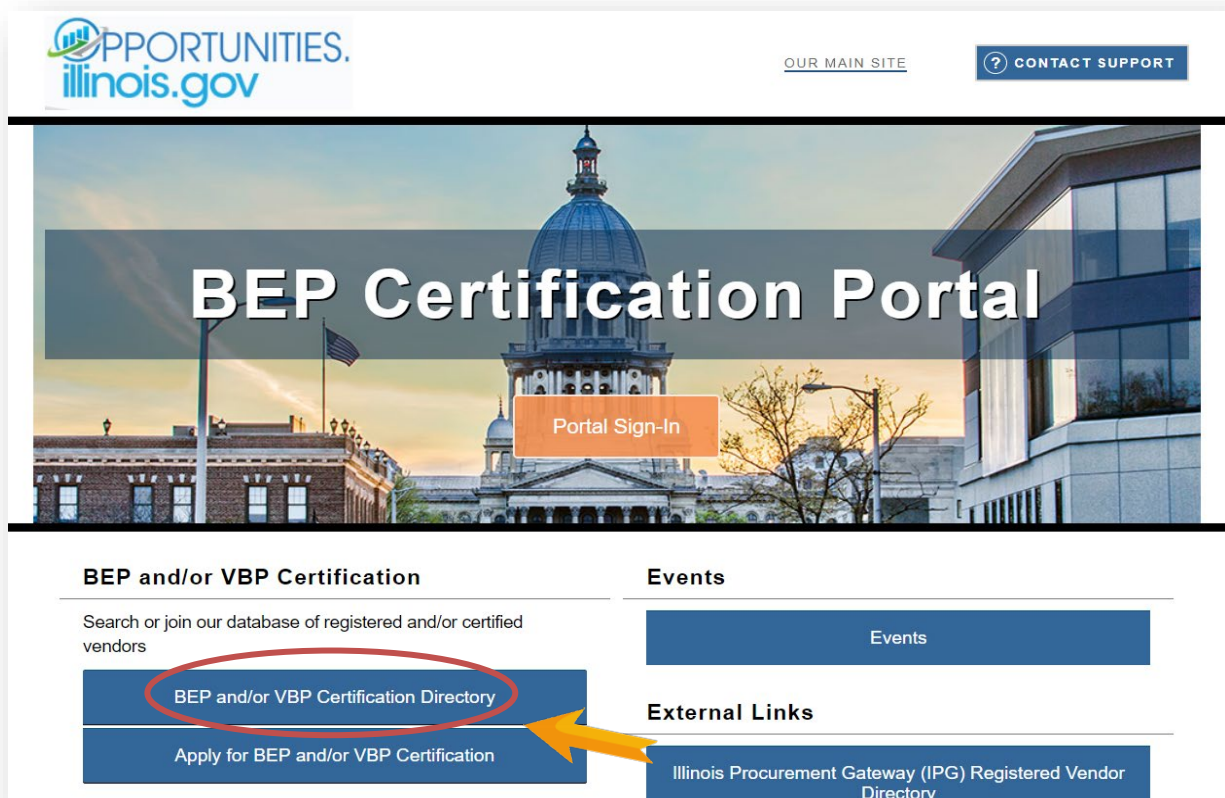
The Numerator – the number of individual/not duplicated certified BEP firms.

The APO will determine the numerator **for each** NIGP CLASS Item Code, **only** using the BEP online vendor directory at: <https://cms.diversitycompliance.com/>

STEPS TO ESTIMATING CERTIFIED BEP AVAILABILITY:

Go to <https://cms.diversitycompliance.com/>. It is not necessary to log in to the BEP Certification Portal to perform your searches and obtain the vendor counts necessary for the **BEP Project Goal Setting Form**.

1. Once the BEP Certification Portal loads, click on “**BEP and/or VBP Certification Directory**”.



2. The top half of the following screen allows you to select which groups of certifications are appropriate for your vendor search. **To set a BEP goal, select all categories except for the two Veteran classifications.** If you are establishing a Veteran goal, only select the two Veteran categories.

OPPORTUNITIES.illinois.gov OUR MAIN SITE CONTACT SUPPORT

Search Registered Vendor Directory

Search our Registered Vendor Directory by entering search criteria and clicking Search. You must select at least one certification type. You can also search by a variety of other fields which are listed below.

Search results may be downloaded to Excel, by clicking the "Download Results to Excel" button after your search results are displayed. To download the full Certification Directory do not enter search criteria, scroll to the bottom of the page and click the "Download Entire Directory to Excel" button.

Search by Certification Type

CERTIFICATIONS

- ☒ Minority Business Enterprise (MBE)
- ☒ Persons with Disability Business Enterprise (PDBE)
- ☐ Service Disabled Veteran Owned Small Business (SDVOSB)
- ☒ Sheltered Workshop (SWS)
- ☐ Veteran Owned Small Business (VOSB)
- ☒ Women Business Enterprise (WBE)
- ☒ Women/Minority Business Enterprise (WMBE)

Search by Business Name or DBA

BUSINESS NAME/DBA

Tip: Try just a few letters of the firm's name.

3. Scroll down to select the option **"Click to Lookup Commodity Codes"**.

BEP and/or VBP Certification Events

Search by Commodity Code

COMMODITY CODES

[Click to Lookup Commodity Codes](#)

Search Commodity Codes

Enter a search term and click Search. If multiple codesets are available, you can change the selected codeset in the drop down list under the search box. Click **Browse Codes** to view the code set list. When finished, click **Finish** to close this panel.

Search

NIGP: National Institute of Governmental Purchasing ▾

[Browse Codes](#) [Finish](#)

4. Once you select the **"Click to Lookup Commodity Codes"** option, a search box opens so you can enter your selection. **Enter the specific five-digit NIGP CLASS Item Code to establish the number of BEP vendors to enter on the BEP Project Goal Setting Form.**

Once the NIGP CLASS Item Code result is displayed under the “Search” box, make sure to select **Add** under **Actions** .

Search by Commodity Code

COMMODITY CODES

Click to Lookup Commodity Codes

Search Commodity Codes

Enter a search term and click Search. If multiple codesets are available, you can change the selected codeset in the drop down list under the search box. Click **Browse Codes** to view the code set list. When finished, click **Finish** to close this panel.

91468

Search

Browse Codes

Finished

NIGP: National Institute of Governmental Purchasing

Search by Contact Person

- In the following example, you will see the search results for the broad description search for “Plumbing” in the BEP vendor directory. All the NIGP CLASS and CLASS Item Codes are listed here. This type of search is useful to help define and determine the various types of goods and services associated with plumbing that will be required in establishing an overall goal for the contract. These results identify all the NIGP CLASS and CLASS Item Codes associated with plumbing. You are now able to **select the specific NIGP CLASS Item Code(s) associated with the procurement to enter on the BEP Project Goal Setting Form.**

Search Commodity Codes

Click any **Add** link to select a code. You can also search again, sort the list, or click **Browse Codes** to browse through the entire code list. If multiple codesets are available, you can change the selected codeset in the drop down list under the search box. Click **Browse Codes** to view the code set list. When finished, click **Finish** to close this panel.

plumbing

Search

Browse Codes

Finished

NIGP: National Institute of Governmental Purchasing

Actions

Code Type

Code

Code Description

Add

NIGP

57031

Lead: Bulk, Granulated, Strips, etc., Not Plumbing or Paint

Add

NIGP

57070

Steel, Galvanized: Bars, Pipes, Not Plumbing, Plates, Rods, Sheets, Strips, etc.

Add

NIGP

65802

Brass, Plumbing Tubular Goods

Add

NIGP

670

Plumbing Equipment, Fixtures, and Supplies

Add

NIGP

67000

PLUMBING EQUIPMENT, FIXTURES, AND SUPPLIES

Add

NIGP

67054

Brass, Plumbing Tubular Goods (Inactive, please see commodity code 658-02 effective January 1, 2016)

Add

NIGP

67055

Plumbing Fixtures and Parts

Add

NIGP

67056

Plumbing Trim: Faucets, Fittings, etc.

Add

NIGP

67057

Plumbing Equipment, Accessories and Supplies (Not Otherwise Classified)

Add

NIGP

67058

Rubber Goods and Plumbing Specialties: Gaskets, Leathers, Seats, Washers, etc.

Add

NIGP

67095

Refurbished Plumbing Equipment, Accessories and Supplies

Add

NIGP

91042

Kitchen and Bathroom Fixture Repair Services, Not Plumbing: Bathtubs, Sinks, Cabinets, Counter Tops, etc.

Add

NIGP

91060

Plumbing Maintenance and Repair Services: Pressure Tapping Services, Pipe Freezes, Toilets, etc.

Add

NIGP

91468

Plumbing

Add

NIGP

934

EQUIPMENT MAINTENANCE AND REPAIR SERVICES FOR LAUNDRY, LAWN, PAINTING, PLUMBING, AND SPRAYING EQUIPMENT

Add

NIGP

93400

EQUIPMENT MAINTENANCE AND REPAIR SERVICES FOR LAUNDRY, LAWN, PAINTING, PLUMBING, AND SPRAYING EQUIPMENT

Add

NIGP

93464

Plumbing Equipment and Fixtures Maintenance and Repair

Add

NIGP

96760

Plumbing Equipment, Pipe, Fittings and Fixtures Manufacturing Services

Add

NIGP

98154

Plumbing Equipment Rental or Lease

Add

NIGP

99878

Plumbing Equipment and Supplies, Sale of Surplus and Obsolete Items

To sort, click column title.

1 - 20 of 20 records displayed

6. Once you have identified all of the specific scopes of work necessary for the procurement, it is time to start compiling data for **BEP Project Goal Setting Form**. For this example, let's assume that only the **NIGP Code 91468 – Plumbing** is required for the procurement. On the screen following, we have entered 91468 in the Search box, and then select “**Search**”.

Search by Commodity Code

COMMODITY CODES

Click to Lookup Commodity Codes

NIGP 91468: Plumbing ([remove](#))

Options:

☐ Match any codes with same number code (?)

☐ Include any lower level codes of those selected (?)

[Clear All Commodity Codes](#)

Search Commodity Codes

Click any **Add** link to select a code. You can also search again, sort the list, or click **Browse Codes** to browse through the entire code list. If multiple codesets are available, you can change the selected codeset in the drop down list under the search box. Click **Browse Codes** to view the code set list. When finished, click **Finish** to close this panel.

91468 Search Browse Codes Finished

NIGP: National Institute of Governmental Purchasing

Actions	Code Type	Code	Code Description
Add	NIGP	91468	Plumbing

1 - 1 of 1 record displayed

7. After the Search, the following screen displays your results. At this point, choose “**Add**” associated with the NIGP Code.

Search Commodity Codes

Click any **Add** link to select a code. You can also search again, sort the list, or click **Browse Codes** to browse through the entire code list. If multiple codesets are available, you can change the selected codeset in the drop down list under the search box. Click **Browse Codes** to view the code set list. When finished, click **Finish** to close this panel.

91468 Search Browse Codes Finished

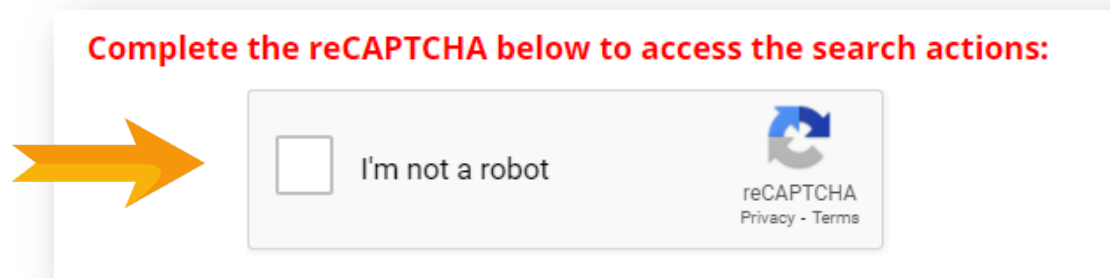
NIGP: National Institute of Governmental Purchasing

Actions	Code Type	Code	Code Description
Add	NIGP	91468	Plumbing

1 - 1 of 1 record displayed

8. After you click the “**Add**” button, you will note on the screen following that the NIGP Code selection of 91468 has now been displayed. At this point, select “**Finished**”. You may select multiple NIGP CLASS Item Codes here if there are multiple NIGP CLASS Item Codes under the first three-digits of the NIGP CLASS Code.

9. Click in the box and let the system know that you are not a robot.



10. After you check the box indicating that you are not a robot, press the “**Search**” button at the bottom of the screen. The following screen will be displayed with the results of your search. Note that 29 BEP certified vendors were identified within the NIGP CLASS Item Code of 914-68. If you are searching multiple NIGP CLASS Item Codes in the same CLASS Code, be sure to download the results to Excel to remove duplicates.

Search Parameters [Edit Parameters](#) [Clear Parameters](#)

CERTIFICATIONS: Minority Business Enterprise (MBE), Persons with Disability Business Enterprise (PBE), Sheltered Workshop (SWS), Women Business Enterprise (WBE), Women/Minority Business Enterprise (WMBE)

COMMODITY CODES: NIGP 91468: Plumbing

[Download Search Results](#)

Search Results [Click the certification type for contact information and certification details](#)

29 firms with 29 certifications found

Vendor	Location	Certification
2 Code Plumbing, LLC	Antioch, IL	MBE
A & H Mechanical, Inc.	Chicago, IL	MBE
Abitua Sewer, Water & Plumbing Inc.	Lake In The Hills, IL	MBE
AMALGAMATED SERVICES, INC.	Frankfort, IL	WBE
B.E. Scaife Plumbing Company, Inc.	Saint Louis, MO	MBE
Brookhaven Plumbing, Inc.	Chicago, IL	MBE

Enter the number of individual BEP certified firms (29) on the **BEP Project Goal Setting Form** in the column identified as “**BEP FIRMS**”, on the line with the associated NIGP Class Item Code. If there were multiple NIGP CLASS Item Codes in the search, place the resulting number on the first line of the CLASS Item Code of that group on the form.

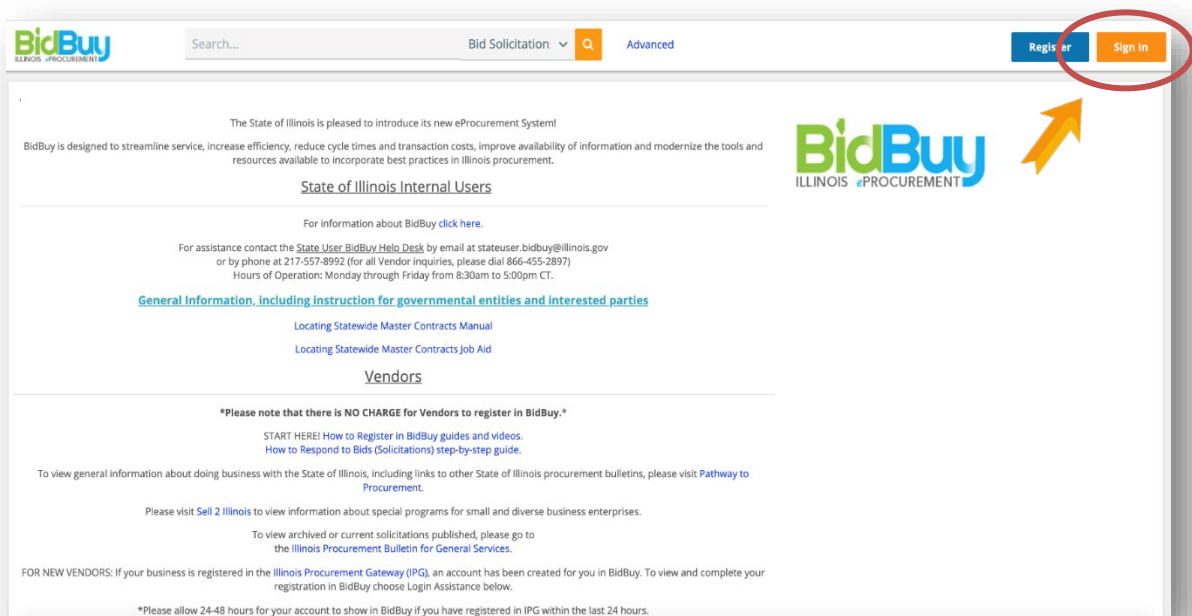
11. If you have selected multiple NIGP CLASS Item Codes for your procurement, complete the above steps as necessary for each NIGP CLASS Code section on the **BEP Project Goal Setting Form**. Note, when you use the “**Back**” feature to perform the additional searches, the site often defaults back to a Vendor search, and you will have to click on the commodity code radial button again.

The Denominator – the number of all individual/not duplicated BidBuy available firms.

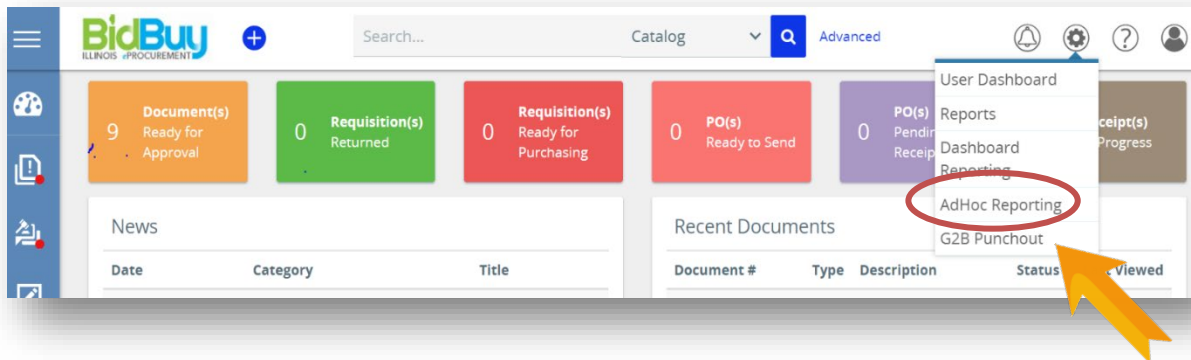
Now that the goal setting formula's numerator (BEP certified firms) has been identified, let's turn our attention to find the denominator of the formula – the number of individual BidBuy firms within each NIGP CLASS Code identified for the procurement.

Just as you can **only** use the BEP Certification Portal to identify BEP certified firms, you may **only** use BidBuy to determine the number of **BIDBUY ALL FIRMS** required on the **BEP Project Goal Setting Form**.

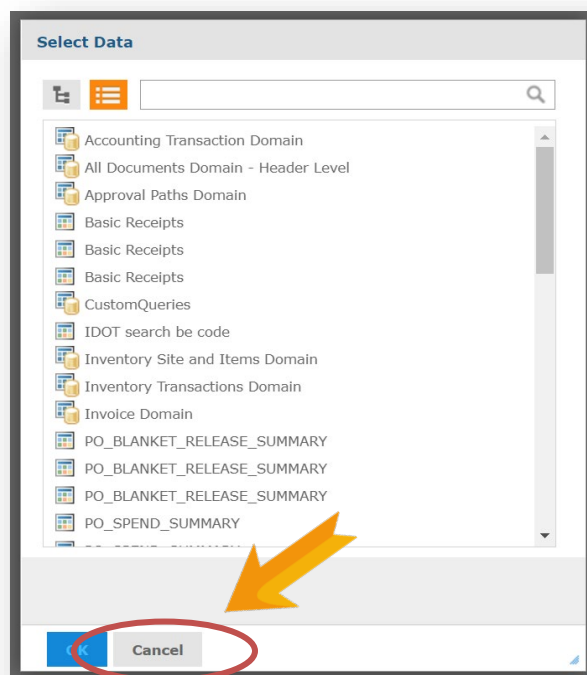
1. Go to <https://www.bidbuy.illinois.gov/bsol>. Currently there are two options to retrieve the denominator value from BidBuy. Let's look at the first option – **log into BidBuy**. Only if you login to BidBuy, are you capable of selecting multiple NIGP CLASS Item Codes in one search. This allows the option of downloading the search results into Excel where you can remove the duplicate records through an Excel option under the Data tab. The number of individual/not duplicated BidBuy firms is then entered on the **BEP Project Goal Setting Form**.



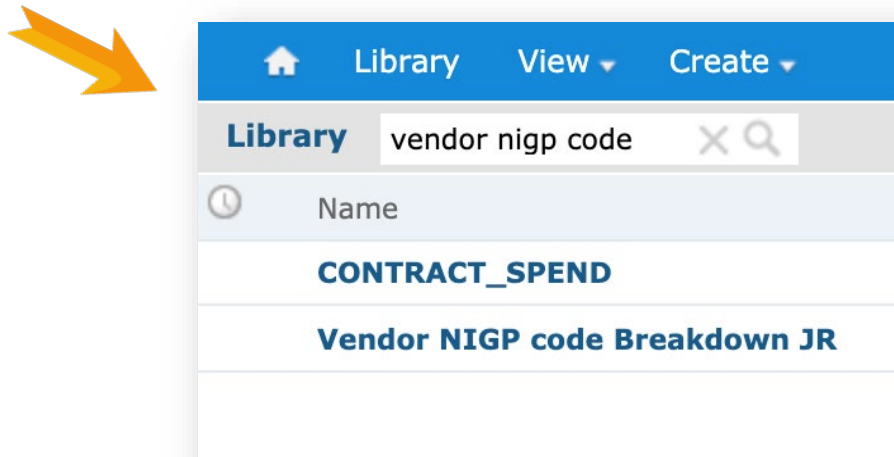
2. Once you are signed into BidBuy, from the top menu bar, click on the settings icon and from the dropdown box choose **“AdHoc Reporting”**.



3. Once AdHoc Reporting is selected, the following screen appears. Click the **“Cancel”** button at the bottom of the screen.

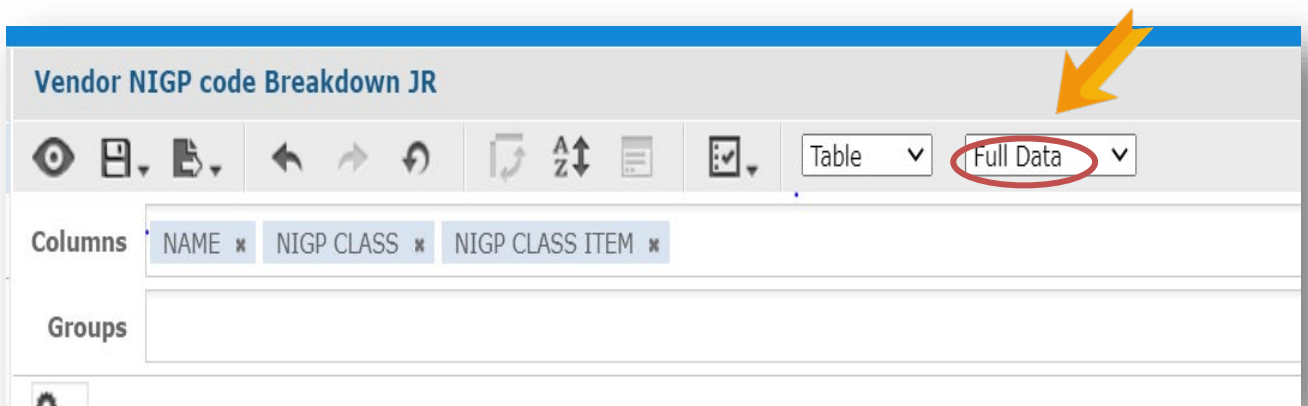


4. On the resulting BidBuy screen in AdHoc Reporting, select **“Library”** from the top left menu selection.

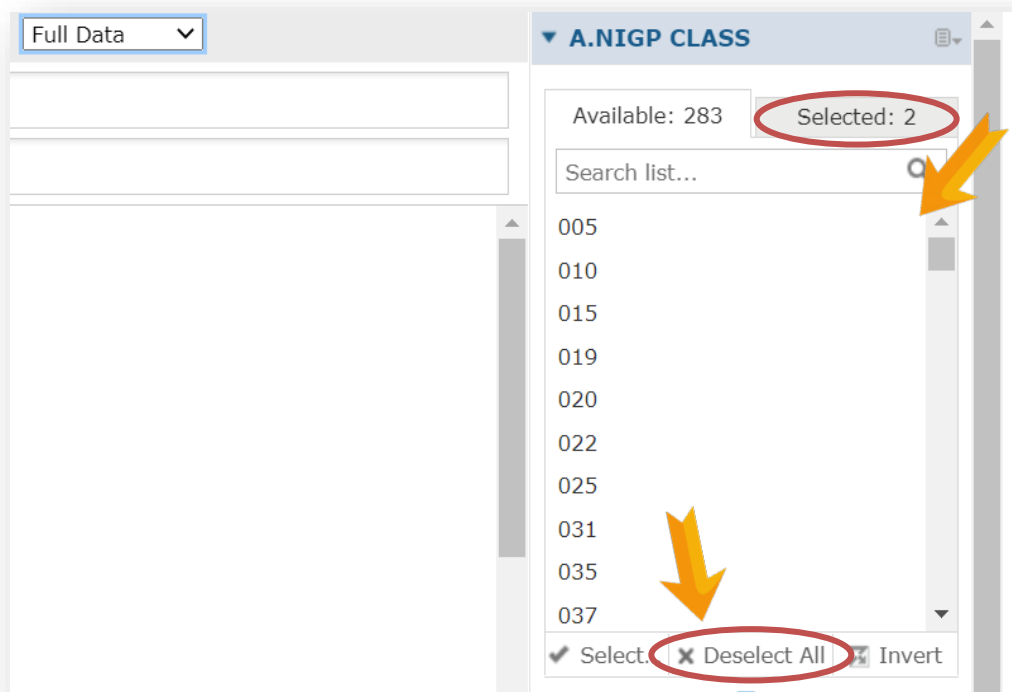


5. After you have selected Library from the menu in the search box, start entering 'vendor nign code'. From the resulting list displayed, choose **"Vendor NIGP code Breakdown JR"**.

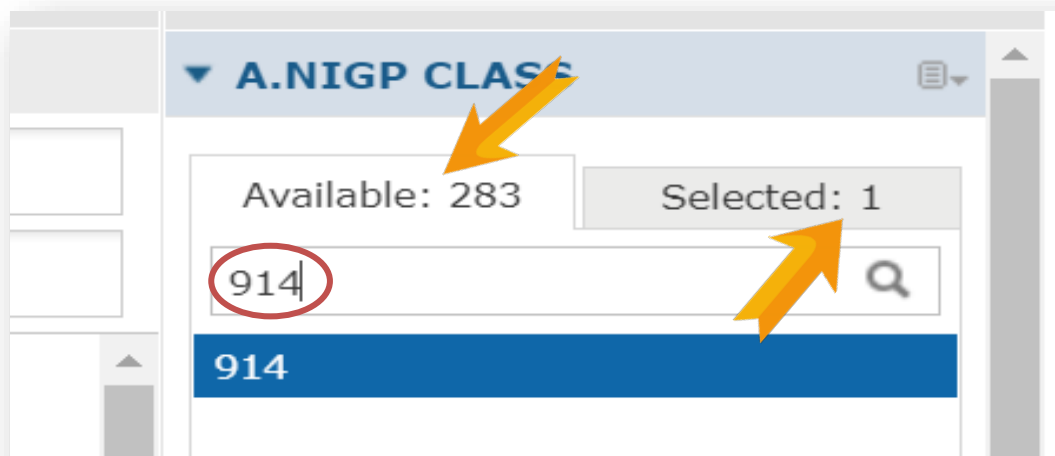
Before you begin selecting the NIGP CLASS Item Codes to search, make sure that you select **"Full Data"** next to the "Table" field at the top of the screen – this will ensure that all records are displayed.



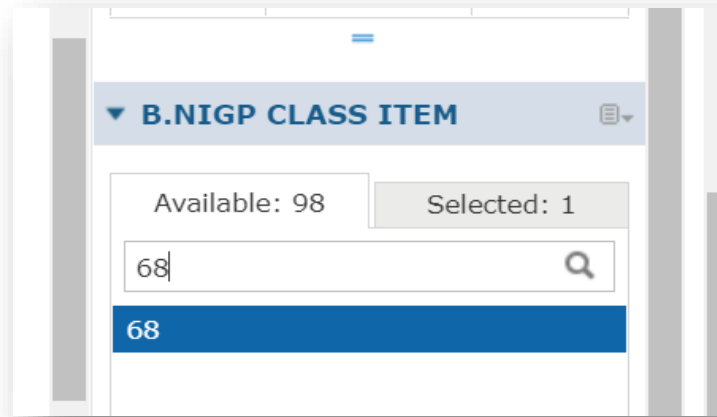
6. On the following note there are values in the **"Selected"** box, make sure you **"Deselect All"** before you begin making your NGP CLASS Item Code selections.



7. Once the “**Selected**” number is 0, you may then begin your search. Enter the first three digits of the NIGP CLASS Code you are selecting in the search list box, in this example 914. Once the number is displayed, below the search box click on it until the background turns blue and the value of “1” appears in the selected box.



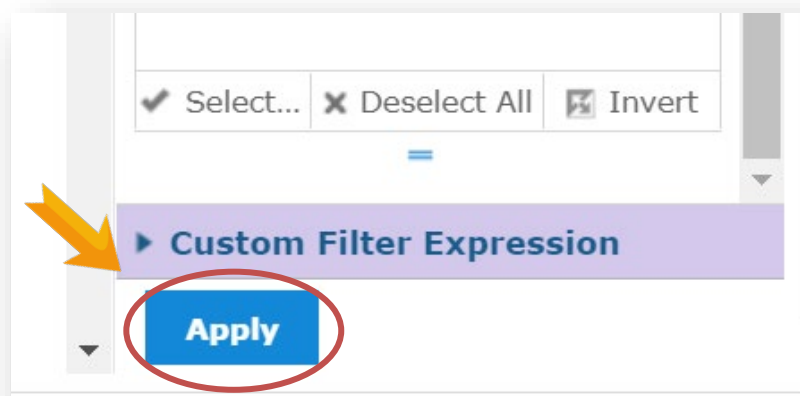
8. Follow the same process for selecting the next two digits of the NIGP CLASS Item Code 68. Make sure you “**Deselect All**” before you enter 68.



The screenshot shows a web interface for searching NIGP CLASS items. At the top, there is a header "B.NIGP CLASS ITEM" with a dropdown arrow. Below this, there are two boxes: "Available: 98" and "Selected: 1". A search input field contains the text "68" and has a magnifying glass icon to its right. Below the search field, a list of results is shown, with the number "68" highlighted in a blue bar.

If you are searching multiple NIGP CLASS Item Codes that are under the same first three-digit NIGP CLASS Code, then select all of them here under the NIGP CLASS Item Code screen function. The resulting search data can be downloaded into Excel so the duplicates can be removed through an Excel Data tab function. The resulting individual /not duplicated number of BidBuy firms is then entered on the **BEP Project Goal Setting Form**.

9. After you select all the two-digit NIGP CLASS Item Codes needed for the search, select “**Apply**”.



The screenshot shows a dialog box titled "Custom Filter Expression". At the top, there are three buttons: "Select..." (with a checkmark icon), "Deselect All" (with an 'X' icon), and "Invert" (with a square icon). Below these buttons, there is a blue bar with the text "Custom Filter Expression". At the bottom of the dialog, there is a blue button labeled "Apply". A red circle is drawn around the "Apply" button, and a yellow arrow points to it from the left.

10. After you select **Apply**, the following table will display the results. Scroll to the bottom of the displayed list to obtain the total. In this example, 161 individual/not duplicated BidBuy vendors were identified in the NIGP CLASS Item Code 914-68. If multiple NIGP CLASS Item Codes were included in the search, download the data to Excel and remove the duplicates.

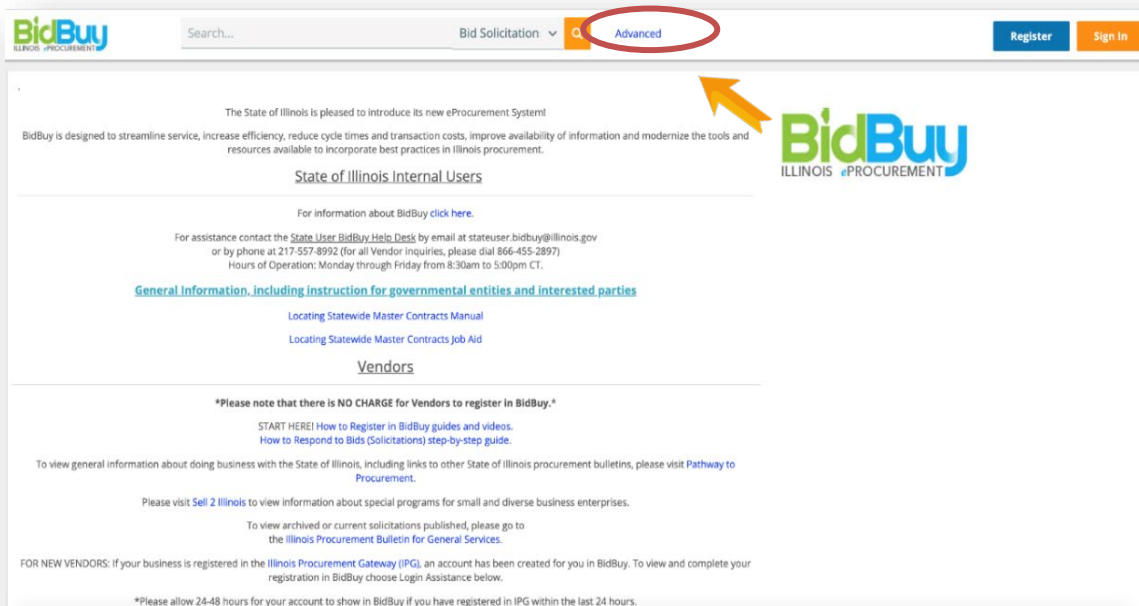


the harriss creations inc	914	68
C and M Waterproof and Sealant Inc.	914	68
NorthStar Construction LLC	914	68
Lead Seeker Digital Marketing	914	68
Johnson Plumbing and Heating, Inc	914	68
Royse's Plumbing Heating, & Air Inc.	914	68
Kee Solutions LLC	914	68
161	161	161

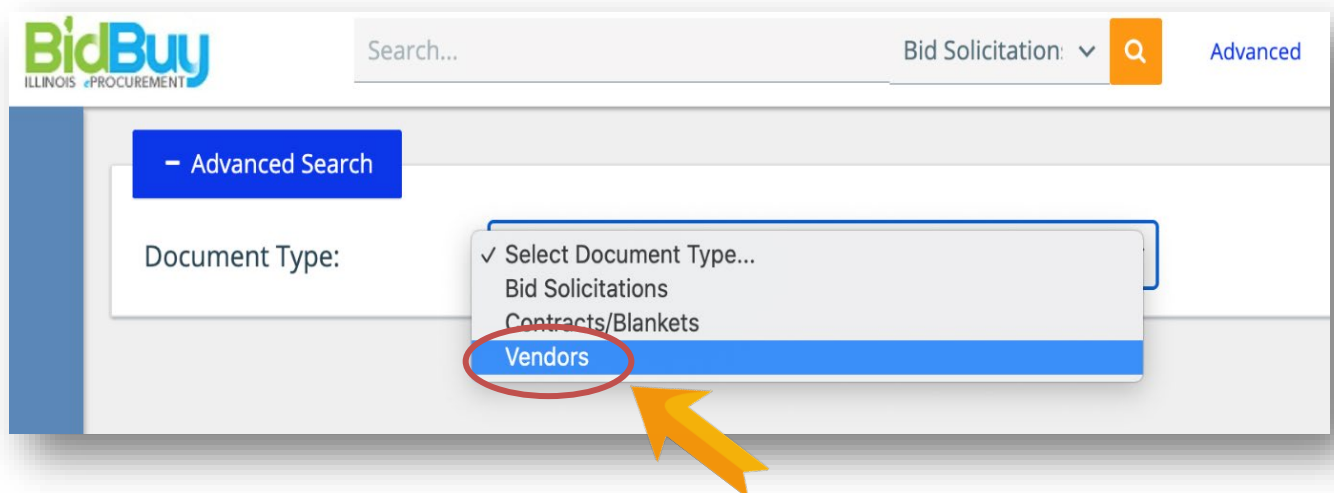
11. The resulting individual/not duplicated number will be placed on the **BEP Project Goal Setting Form** under the column heading “**BIDBUY ALL FIRMS**”.

Another option available from BidBuy to identify BidBuy vendors within an NIGP CLASS Item Code does not require you to log into BidBuy to obtain the necessary results. This option may be an easier approach available, however, this search is **only good for one individual NIGP CLASS Item Code search at a time**. Multiple search results of CLASS Item Codes can still be individually downloaded and combined with other results of the with the same three-digit CLASS Codes to remove duplicates.

1. Select the “**Advanced**” option at the top of the BidBuy home screen.



2. After you have selected the Advanced option, the following screen will display.



Select “**Vendors**” from the dropdown box.

3. Once “Vendors” is selected, the following screen is displayed. Go to the “**NIGP CLASS**”, and “**NIGP CLASS ITEM**” dropdown boxes and select the appropriate Codes from the lists – 914 under NIGP CLASS Code and 68 under NIGP CLASS Item Code.

Advanced Search

Document Type: Vendors

Match Criteria: All

Vendor Name: _____ Vendor Legal Name: _____ Vendor #: _____

Vendor Tax ID: _____ Alternate ID: _____ City: _____

Zip Code: _____ County: _____ State: Select State... ▾

NIGP Class: 914 - CONSTRUCTION SERVICES, TRADES NIGP Class Item: 68 - Plumbing NIGP Keyword: _____

Emergency Vendor: ☐ Reference Vendor: ☐ Pay Only Vendor: ☐

Federal Tax Classification: ☐ Individual ☐ Sole Proprietor ☐ Partnership/Legal Corporation ☐ Corporation

Vendor - Not Utilized for State Contracting Goals: ☐ Asian / Pacific Islander ☐ African American ☐ Caucasian ☐ Hispanic

- After you make your NIGP CLASS and CLASS Item Code selections, go to the bottom of the screen, and click the **“Search”** button.

☐ Yes - Subcontractor only

Browse By Vendor Name:

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

0 1 2 3 4 5 6 7 8 9

Search Clear

- Once the search is complete, your search results are displayed at the top of the screen. Enter the total number of BidBuy vendors identified on this report on the **BEP Project Goal Setting Form** under the column heading **“BIDBUY ALL FIRMS”** on the same row as the 914-68 NIGP CLASS Item Code reference.

Results

1-25 of 159 << 1 2 3 4 5 6 7 >>								
Vendor ID	Vendor Name	Address	City	State	Postal Code	Contact Name	Phone	
V00006227	2 Code Plumbing, LLC	21438 W. Grass Lake Rd., IL	Antioch	IL	60002			
V00002296	217, Inc	807 Dennison Dr	Champaign	IL	61820	217, Inc.	2172811650	
V00015682	360 CORPORATE CONSTRUCTION LTD	2361 South State Street	Chicago	IL	60616			
V00008082	A. D. Binder Plumbing & Heating, LLC	2940 N. Dinneen St.	Decatur	IL	62526	Arthur Binder	2178754149	
V00011777	Adam's Trade & Services, Inc.	10 N. Martingale Rd.	Schaumburg	IL	60173	Adam J. Grabowski	8479714707	
V00017245	Agile Procurement & Consulting Services, LLC	1802 Vale St	Champaign	IL	61822			
V00019618	All-Pro Heating, AC & Plumbing	122 W. Sale St	TUSCOLA	IL	61953			
V00003432	Allied Mechanical Services, Inc.	3103 Tatman Court, Suite 104	Urbana	IL	61802			
V00002108	Allstate Concrete Cutting Inc.	514 Rollins Rd	Ingleside	IL	60041	Mike Seay	8479739752	
V00008394	Alvarado Plumbing, Inc.	P.O. Box 131	Morrison	IL	61270	Nick Alvarado	8157722977	

6. Completing the **BEP Project Goal Setting Form** closes the goal setting process for the procurement personnel. For specific details on entering and grouping data on the form, we are using an example of a procurement for modular furniture for state buildings.

Please note there have been modifications to the original **BEP Project Goal Setting Form Version 1/24/21**. – the new form version 2/7/21 is utilized for this example.

This version of the form allows you to either enter the scope dollar amount in the column labeled “ENTER SCOPE DOLLAR AMOUNT”, or you can enter the percentage weight of scope in the column labeled “ENTER % WEIGHT OF SCOPE” – but not both columns for the same NIGP CLASS Code – one column or the other. The results of your entry will be displayed in adjacent protected columns. This worksheet also contains over 100 lines with formulas available alleviate having to insert any lines. Contact your BEP CO if any you have additional requirements.

In the following example, both weighted selection options are demonstrated.

For this procurement there are seven specific NIGP CLASS Item Codes identified for the contract, within four groupings by the first three-digits of the NIGP CLASS Code. There is a scope dollar percentage assigned to each of the four groupings. In this example the five-digit NIGP CLASS Item Codes share the common first three-digit NIGP CLASS Code are grouped together as displayed on the following form.

There are three NIGP CLASS Item Codes (425-54, 425-55, 425-94) under the first NIGP CLASS Code of 425. The search for the individual BEP and BidBuy vendors required including all three of the CLASS Item Codes in the one search, then removing the duplicates from the results. The values were then placed on the **BEP Project Goal Setting Form** under the appropriate column headings on the first line of that three-digit NIGP CLASS Code grouping – see the example form.

The example's search results, after removing the duplicates, in the first grouping of NIGP CLASS Code of 425, yielded a total of 7 individual BEP certified vendors found in all three of the NIGP CLASS Item Codes combined under 425. The number 7 is entered under "BEP FIRMS" on the first line of the 425 grouping as illustrated on the form. Use the same process and entry protocol for the BidBuy "ALL FIRMS" numbers which yielded a total of 68.

Continue this process until all NIGP CLASS and CLASS Item Codes identified on the form for the procurement have been addressed. NIGP CLASS Item Codes that stand alone on the form will not require the removal of any duplicates.

The Total Project Amount must be weighted across the four NIGP CLASS Codes identified on the example form and the sum of these four weighted scopes equal the Total Project Amount at the top of the form. In some instances, if you mix weighted choices between CLASS Codes on the same form the results may vary slightly.

The form does all calculations automatically – any modifications to the goal calculated on the form requires historical or anecdotal evidence.

The lighter blue shaded columns and cells on the form are protected fields containing formulas. The additional lines on the worksheet are collapsed at the bottom of the form before the Totals row. It is recommended that you maintain one copy of this form as a template and duplicate as many times as necessary for your procurements.

BEP PROJECT GOAL SETTING FORM										
										Version 20.0 (Revised 2/7/2021)
PROJECT TITLE: JPMC H. Miller Furniture										
BIDBUY PROJECT NUMBER: R- B-		PROJECT AGENCY & DEPARTMENT: CMS								
PROJECT DESCRIPTION: modular furniture contract										
TOTAL PROJECT AMOUNT: \$387,500.00		BEP COMPLIANCE OFFICER: Craig Compliance								
OVERALL PROJECT GOAL: 11%		RENEWAL (Y/N): no								
PRIMARY SERVICE CATEGORY: Other		SECONDARY SERVICE CATEGORY:								
DATE: 2/7/2021		PROCUREMENT LEAD: Mike Modular								
NOTES: This is a JPMC for governmental units to purchase H. Miller modular furniture										
MAJOR NIGP CLASS CODE SCOPE	NIGP CLASS ITEM CODE	NIGP CODE DESCRIPTION	ENTER SCOPE DOLLAR AMOUNT	ENTER % WEIGHT OF SCOPE	SCOPE DOLLAR AMOUNT DISPLAYED	% SCOPE WEIGHT DISPLAYED	BEP FIRMS	BIDBUY ALL FIRMS	ESTIMATED AVAILABILITY	SCOPE GOAL
office furniture	42554	Modular Panel Systems, With Metal Connecting Mechanism	375,000.00		\$ 375,000.00	96.8%	7	68	10%	9.96%
office furniture	42555	Modular Panel Systems, With Synthetic Connecting Mechanism			\$ -	0.0%				
office furniture	42594	Work Stations, Modular, Systems Furniture			\$ -	0.0%				
					\$ -	0.0%				
decals and stamps	25540	Inventory and Other Small Decals		1.0%	\$ 3,875.00	1.0%	0	40		
decals and stamps	25505	Bar Code Decals			\$ -	0.0%				
					\$ -	0.0%				
paper & plastic products	64044	Packing List Envelopes, Plastic and Paper, Self Adhesive		1.0%	\$ 3,875.00	1.0%	0	34		
					\$ -	0.0%				
delivery	96286	Transportation of Goods, Shipping and Handling, and Other Freight	4,750.00		\$ 4,750.00	1.2%	84	105	80%	0.98%
					\$ -	0.0%				
					\$ -	0.0%				
					\$ -	0.0%				
					\$ -	0.0%				
TOTALS:					\$ 387,500.00	100%				10.94%

SECTION VI – GOAL ANOMALIES

Central Management Services and BEP have implemented this new goal setting methodology to better align diversity goals to State procurements. The following changes have been implemented to increase the BEP goal:

1. The elimination of limiting the BEP and BidBuy vendor searches to Illinois.
2. The increase of BEP certified vendors to the pool through FastTrack Certification process.
3. The elimination of Hoovers and replacement with BidBuy for the goal setting formula's denominator.

These changes may potentially increase the BEP goal on some procurements, at times producing goals well over 25%. In these cases, adjustments will be made on a case by case basis between BEP Compliance and Procurement Officers to establish a reasonable and obtainable goal for the procurement. Considerations will be made on the goods or services being procured, BEP and BidBuy vendor availability, and historical and anecdotal evidence.

SECTION VII – FINALIZING CERTIFIED BEP GOAL SETTING

When all the goal setting steps have been completed on the form, the BEP-CO will thoroughly review the results to ensure that the goal is reasonable and attainable. These calculations are the initial basis to set the final goal. The goal may be modified based on review and justification by the BEP-CO regarding contract history and/or anecdotal evidence.

The BEP-CO will review the **BEP Project Goal Setting Form** received from the Procurement Officer and will then complete the **BEP Contract Goal Setting Review Form**. The State must be able to show consistency and documentation of the goal setting process, including justifying any potential modifications to the goal established on the form. The goal established on **the BEP Contract Goal Setting Review Form** will be the goal listed on the solicitation and contract document.

All NIGP CLASS Item Codes identified on the **BEP Project Goal Setting Form** must be identified to the bidders in the solicitation documentation.

APPENDIX A – GOAL SETTING FORMS

BEP PROJECT GOAL SETTING FORM Version 20.0 (Revised 7/27/21)										
PROJECT TITLE:										
BIDBUY PROJECT NUMBER:		R- B-	PROJECT AGENCY & DEPARTMENT:							
PROJECT DESCRIPTION:										
TOTAL PROJECT AMOUNT:		BEP COMPLIANCE OFFICER:								
OVERALL PROJECT GOAL:		0%	RENEWAL (Y/N):							
PRIMARY SERVICE CATEGORY:		SECONDARY SERVICE CATEGORY:								
DATE:		PROCUREMENT LEAD:								
NOTES:										
MAJOR NIGP CLASS CODE SCOPE	NIGP CLASS ITEM CODE	NIGP CODE DESCRIPTION	ENTER SCOPE DOLLAR AMOUNT	ENTER % WEIGHT OF SCOPE	SCOPE DOLLAR AMOUNT DISPLAYED	% SCOPE WEIGHT DISPLAYED	BEP FIRMS	BIDBUY ALL FIRMS	ESTIMATED AVAILABILITY	SCOPE GOAL
					\$ -	0.0%				
					\$ -	0.0%				
					\$ -	0.0%				
					\$ -	0.0%				
					\$ -	0.0%				
					\$ -	0.0%				
					\$ -	0.0%				
					\$ -	0.0%				
					\$ -	0.0%				
					\$ -	0.0%				
					\$ -	0.0%				
					\$ -	0.0%				
					\$ -	0.0%				
					\$ -	0.0%				
					\$ -	0.0%				
					\$ -	0.0%				
					\$ -	0.0%				
					\$ -	0.0%				
					\$ -	0.0%				
					\$ -	0.0%				
					\$ -	0.0%				
					\$ -	0.0%				
					\$ -	0.0%				
					\$ -	0.0%				
					\$ -	0.0%				
					\$ -	0.0%				
TOTALS:					\$ -	0%				0.00%



BEP PROJECT GOAL SETTING REVIEW FORM

BIDBUY NUMBER:		CONTRACT AGENCY:	
CONTRACT TITLE:		AGENCY PROCUREMENT OFFICER:	
TOTAL CONTRACT AMOUNT:		AGENCY RECOMMENDED GOAL:	
RENEWAL (Y/N):		PRIMARY SERVICE CATEGORY:	

CMS CONTRACT GOAL SETTING FORM

Date
Received:

- ☐ Concur with the overall goal for the contract.
- ☐ Recommend the following adjusted goal to the contract:

Identify the Scope(s) of Work	All BEP Firms Available	All BidBuy Firms Available	Reason for Adjustment and/or Comments
BEP RECOMMENDED GOAL:			

BEP Compliance Officer
(Version 20.0 – 1/24/21)

Signature

Date