



Illinois Commission on Equity and Inclusion

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FY24 and FY25 BEP COMPLIANCE PLAN INSTRUCTIONS

The Commission on Equity and Inclusion's Business Enterprise Program (BEP) Compliance Unit provides these instructions to assist you in reporting your entity's plans for compliance with the [BEP Act](#) during FY24 and FY25. The compliance plan reporting process comprises three major components that must be completed by the requesting entity.

Components of the Compliance Plan Reporting Process

Part I - Commitment to Comply with the BEP Act. By statute, the State agency directors, public institutions of higher education (PIHEs) presidents, and community college presidents are held responsible for compliance with the BEP Act. Those commitments are detailed in this component of the compliance plan.

Part II - Compliance Plan Detail Workbook. This Excel workbook details the amount of appropriated funds each agency, PIHE, or community college plans to spend or exempt from BEP-certified firm usage per detail object code and the entity's justification for this action. Agencies and PIHEs will use the same reporting template. Community colleges have a separate template.

Part III - Entity Contact Form. This form captures each entity's contact information for the applicable BEP Liaison, purchasing officer, director, PIHE president, and the person submitting the compliance plan on behalf of the organization.

There have been many changes to the FY24 and FY25 reporting templates. Use of prior years' templates will not be accepted. Only submit the designated templates in this correspondence or those provided through the [BEP Compliance Unit website](#). Your entity is responsible for completing and submitting all three components of its compliance plan to the BEP Compliance Unit.

All submissions for the FY24 and FY25 Compliance Plans must be received no later than December 15, 2023.

PART I: Commitment to Comply with the BEP Act

The Commitment to Comply with the BEP Act document is an online questionnaire located through the link provided [here](#). To complete this document, provide the name of your entity's BEP Liaison and purchasing officer and acknowledge your entity's commitment to its adherence to the BEP Act. Upon completion of this form, select the submit button.

PART II: Compliance Plan Detail Workbook

Part II is the budget detail workbook. This workbook comprises four individual tabs: the FY24 C-Plan tab, the FY25 Projection tab, the Exemption Justification Form, and the [44 Ill Adm. Code 30 Reference](#) tab. The use and function of each tab is explained in the sections below. Some agencies uniquely define their budget allocation dollars by utilizing alternate major object code designations. If your entity requires an additional expenditure category not already listed in the reporting template, please insert, or modify the cells as necessary to include your data in the workbook.

FY24 C-Plan

Allowable Exemption	FY23 Requested Exemption Amount	FY23 Year End Expenditures (Actuals)	Total Dollar Allocation	Total Dollar Allowable Exemption	44 Ill. Adm. Code 30 Reference	44 Ill. Adm. Code 30 Amount	Total FY24 Requested Exemption Amount
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Agencies and PIHEs should only use the FY24/FY25 Part II – Agency PIHE Compliance Plan Template workbook. You will enter your entity's name and identification number at the top of the FY24 C-PLAN and the FY25 Projection tabs. These worksheets are arranged in the budgetary format of major and detail object codes, as defined by the Office of the Comptroller.

Community colleges must use the FY24/FY25 Part II – Community College Compliance Plan Template workbook and will also enter their entity's name and identification number at the top of the FY24 C-PLAN and the FY25 Projection tabs. This template is designed for community colleges and uses object account coding specified for detail expenditure categories not utilized by State agencies and PIHEs. The community college reporting template requires only one expenditure object code category, which is identified as the FM code on the community college template.

Both templates have a column that identifies each detail object code or FM code with a brief description of the expenditure category. 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 on lines referencing a specific detail object code or FM code.

Allowable Exemption

The Allowable Exemption column is informational only and pre-populated with a YES or NO, which 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.

Note: The associated administrative costs for detail object code 1182 and FM codes in the 520 and 529 series are not considered allowable exemptions; these expenditures are subject to BEP goals. This applies only to entities responsible for procuring the administrative components of state employee group health insurance policies.

FY23 Requested Exemption Amount

In the FY23 Requested Exemption Amount column, enter the FY23 requested exemption amount from your last year's compliance plan for each detail object code.

FY23 Year End Expenditures

New: The FY24 C-Plan tab contains a column to capture your entity's year-end expenditures. In the FY23 Year End Expenditures (Actuals) column, enter the FY23 final expenditures for each detail object code.

Total Dollar Allocation

In the Total Dollar Allocation column, enter the dollar amount from all funding sources representing 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.

Total Dollar Allowable Exemption

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 detail object codes and FM codes designated as allowable exemptions with a YES in the Allowable Exemption column.

44 Ill. Adm. Code 30 Reference

New: Illinois Administrative Code guidance for BEP is now under 44 Ill. Adm. Code 30. Report any allowable 44 Ill. Adm. Code 30 exemption(s) your entity has identified in a detail object code or FM code line designated as a non-allowable exemption in the 44 Ill. Adm. Code 30 Reference column. The exemption reference categories for this column are obtained from the 44 Ill. Adm. Code 30 Reference tab of the workbook.

44 Ill. Adm. Code 30 Amount

Report the exemption amount in the 44 Ill. Adm. Code 30 Amount column. These 44 Ill. Adm. Code 30 columns only apply to the detail object codes and FM codes that are identified with a NO in the Allowable Exemption column. If the 44 Ill. Adm. Code 30 exemption is contained within a detail object code or FM code line already identified as an allowable exemption in the Exemption Allowed column, do not enter a cite reference(s) nor an amount in the 44 Ill. Adm. Code 30 Reference and 44 Ill. Adm. Code 30 Amount columns. If more than one 44 Ill. Adm. Code 30 reference is identified within the same detail object code or FM code line, list all the references in this column that are applicable (i.e., 1D, 2E).

Total FY24 Requested Exemption Amount

The Total FY24 Requested Exemption Amount column identifies the total or partially exempted amount of the total dollars allocated for that detail object code.

FY2025 Projection

Allowable Exemption	FY 2024 Requested Exemption Amount	FY24 YTD Expenditures (Actuals)	Total Dollar Allocation	Total Dollar Allowable Exemption	44 Ill. Adm. Code 30 Reference	44 Ill. Adm. Code 30 Amount	Total FY25 Requested Exemption Projection Amount
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New: This year’s compliance plan reporting workbook contains a new FY25 Projection worksheet. Use this tab to insert your agency, PIHE, or community college expenditure requests for expenditures projected to be exempt from BEP goals during FY25. The layout on this tab is similar to the FY24 C-Plan tab but with the addition of new columns for completion. On this sheet, the FY24 Requested Exemption Amount, the FY24 YTD Expenditures (Actuals), and the Total FY25 Requested Exemption Projection Amount have been included.

The FY24 Request Exemption Amount column on the FY25 Projection tab is linked to the FY24 C-Plan tab and will automatically insert the FY2024 Requested Exemption Amount data previously entered on the FY24 C-Plan tab.

FY24 YTD Expenditures (Actuals)

In the FY24 YTD Expenditures (Actuals) column, enter your year-to-date expenditures for each detail object code as of September 15, 2023.

Total FY25 Requested Exemption Projection Amount

The Total FY25 Requested Exemption Projection Amount column identifies the total or partially exempted amount of the total dollars allocated for that detail object code.

Exemption Justification Form

New: The FY24 and FY25 Compliance Plan template expands the opportunity for an entity to justify its request for individual or class contract exemptions. The Exemption Justification Form allows entities to detail each request for an exemption. Every detail object code or FM code with an exemption request not automatically allowed by statute or administrative rule must be accompanied by a completed Exemption Justification Form. All partial or full exemption requests must be denoted by detail object code or FM Code in the Exemption Justification Form tab of the workbook. Duplicate the form as necessary to report each requested exemption. Follow the instructions located on the form.

PART III: Entity Contact Form

Part III captures the entity's contact information for the personnel identified on this form. The Entity Contact Form must be submitted using the link provided [here](#).

Report Submission

The Compliance Plan Detail Workbook must be emailed to CEI.BEP.Compliance@Illinois.gov as an attachment and a writable Excel workbook. Do **not** password protect these documents.

Note: Community Colleges must **also** send their Part II forms to the Illinois Community College Board.

The web addresses for Compliance Plan workbook submissions are as follows:

- BEP Compliance Unit: CEI.BEP.Compliance@Illinois.gov
- Illinois Community College board: ICCB.Finance@illinois.gov

All FY24 and FY25 Compliance Plan submissions must be received by December 15th, 2023.

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

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