



The Commonwealth of Massachusetts
Executive Office for Administration and Finance
Supplier Diversity Office

William M. McAvoy
Executive Director

Charles D. Baker
Governor
Karyn E. Polito
Lieutenant Governor
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Secretary

Memorandum

To: Secretariat and Agency Supplier Diversity Officers (SSDO/ASDO)
Cc: Cabinet Secretaries, Executive Department Agency Heads and Chief Procurement Officers
From: Bill McAvoy, Executive Director
Date: June 23, 2021
RE: **Secretariat and Agency Procurement/Purchasing Plans for FY2022**

Background

On November 2, 2020, the [Baker-Polito Administration announced Comprehensive Measures to Further Promote Diversity in State Contracting](#) and filed "[An Act to Elevate the Supplier Diversity Office to Ensure Equal Opportunity in State Contracting](#)" establishing the Supplier Diversity Office (SDO) as a separate state agency under the Executive Office for Administration and Finance. The SDO is committed to its responsibilities as the oversight agency for diverse spending and our goals to help the Commonwealth succeed in increasing access for diverse companies to state contracting. Therefore, pursuant to MGL c. 7 s. 61, the SDO is requiring secretariats and agencies (hereinafter "departments") to submit annual Procurement/Purchasing Plans to the SDO. To enable the process, in the next week, the SDO will be distributing procurement/purchasing plan templates to each SSDO/ASDO. The procurement/purchasing plans are distinct from the spending planning performed for the Executive Office for Administration and Finance and are focused on increasing the inclusion of diverse and small businesses in each department's business activities.

The planning process applies to each department as a separate organization. While secretariats are encouraged to coordinate procurement/purchasing planning across their agencies, their own procurement/purchasing plan applies only to their own organization.

Intentional Approach to Planning

In the process of developing their procurement/purchasing plans for the SDO, departments are encouraged to identify purchasing, procurement, and contracting opportunities that will be most effective in achieving the following **planning goals**, in order of importance:

- Meet or exceed all SDO **benchmarks** for the upcoming fiscal year;
- Increase **total spending** with diverse and small companies compared to the previous fiscal year; and
- Increase the **number of diverse and small companies** your department does business with compared to the previous fiscal year.

To enable this intentional planning, the cover page of each planning form includes information on each department's prior-year (FY2020) spending. The SDO recognizes that each department's business needs and activities are different and that departments vary in their level of benchmark achievement. Accordingly, departments that did not meet two or more benchmarks in FY2020 are encouraged to focus on the benchmark-related goal. Departments that have exceeded most benchmarks are encouraged to focus on increasing total spending with diverse and small businesses and on increasing the number of diverse and small companies doing business with the department.

Planning Deadlines and Updates

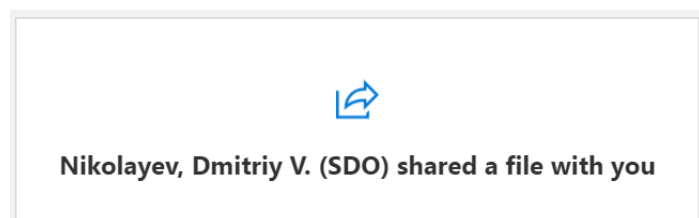
Understanding that procurement planning takes place in stages and depends on the Commonwealth's budget process, the procurement/purchasing plans will be completed in two stages:

- **Draft stage:** Departments will complete the procurement/purchasing plan templates to the best of their ability, focusing on known or expected activity, by **Friday, July 30, 2021**.
- **Final plan:** Departments will complete the final version of the procurement/purchasing plan templates by **Tuesday, August 31, 2021**.

It is expected that departments will continue updating plans throughout the fiscal year to reflect new procurements and changes in spending.

File Location, Sharing and Status

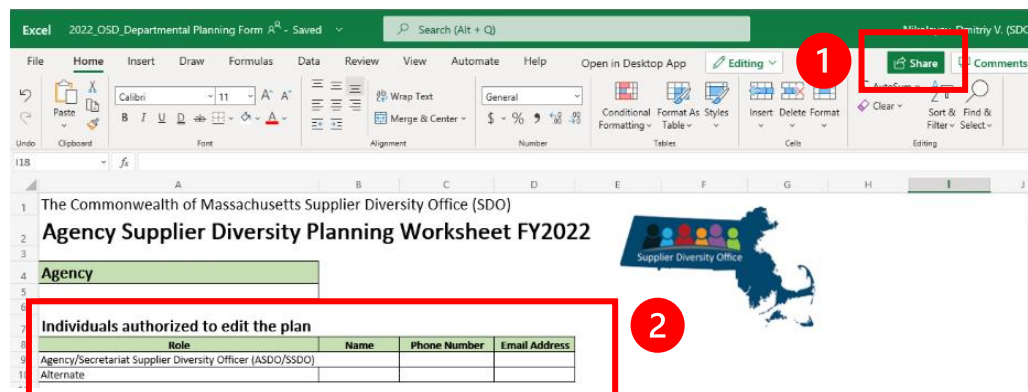
Procurement/Purchasing Forms will be shared with each department's SSDO/ASDO individually during the week of **June 28** using Microsoft SharePoint. The SSDO/ASDO or, if one has not been designated, the Secretariat/Agency Chief Procurement Officer will be notified of this by email that will contain the link to the secretariat/department's planning form. An example email is as follows:



The notification email opens direct access to the planning form as well as provides access to the [SDO Plan SharePoint directory](#) (see the graphic below). In the directory, the planning template will appear with the status "Sent to Agency."

New	Upload	Edit in grid view	Sync	Add shortcut to OneDrive	Export to Excel	Power Apps	Automate
Departmental_Spending_SDO							
Name	Modified	Modified By	Status	Add column			
2022_SDO_Departmental Planning Form.xlsx	A few seconds ago	Nikolayev, Dmitry V. (...)	Sent to Agency				

The use of SharePoint ensures that the SDO and the department maintain one shared copy of the plan and allows collaboration. SharePoint also allows the SSDO/ASDO to share the planning template with a limited number of additional personnel within their secretariat/agency using the “Share” function (see 1 on the graphic below). At least one of these individuals must be named as an Alternate on the form (see 2 on the graphic below). The SDO does not recommend sharing the file with more than three additional personnel to ensure version control.



Staff Training Support Available from the SDO

During the first quarter of FY2022, the SDO will be holding training sessions for personnel involved in ordering, procurement, and contract management. The SDO suggests that departments choose “Staff Training” as one of the actions planned for the first quarter of FY2022.

Plan Submission

Once the draft version of the procurement/purchasing plan has been completed, no later than **Friday, July 30, 2021**, the SSDO/ASDO must submit the plan to the SDO. This can be done by changing the file status in the [SDO Plan SharePoint directory](#) (right-click on the file -> More -> Properties) and changing the status from “Sent to Agency” to “Ready for SDO Review.”

New	Upload	Edit in grid view	Sync	Add shortcut to OneDrive	Export to Excel	Power Apps	Automate
Departmental_Spending_SDO							
Name	Modified	Modified By	Status	Add column			
2022_SDO_Departmental Planning Form.xlsx	A few seconds ago	Nikolayev, Dmitry V. (...)	Ready for SDO Review				

Planning Support Available from the SDO

Departments may contact the SDO at sdp@mass.gov with questions regarding annual procurement/purchasing planning and other questions related to SDO programs. In addition, the SDO will offer regular office hours available to be booked via [Calendly](#), where departments may choose a time and date for a consultation with SDO staff.