ILLINOIS TOLLWAY
Doing Business with the Illinois Tollway
Goods and Services
Jennifer Soldat, Sr. Procurement Training Specialist
March 22, 2021
350+ contracts valued at more than $1.1 billion

Joint Committee on Administrative Rules (JCAR)
Under JCAR, non-construction supplies and services are procured:

- **“Goods”** – Commodities such as rock salt, roadway materials, vehicles, office supplies and software licenses
- **“Services”** – Include procurements for temporary staffing services, IT consulting services and repair services

Procurement Approaches

- **Invitation for Bid (IFB)** – Awarded to lowest responsible and responsive bidder
- **Request for Proposal (RFP)** – Awarded to vendor that provides the overall best value and includes technical criteria in addition to price
- **RFP Professional and Artistic (RFP P&A)** – Qualified by education, experience and technical ability
- **Small Purchase – Request for Quote (RFQ)** – Procurements less than small purchase threshold ($104,100)
How does the program work?

• Over 600 product and service categories at any dollar amount (CPO Notice #2018.01)
• Procurements less than small purchase threshold (currently $104,100) – most products or services qualify
• Any other procurement the Chief Procurement Office deems appropriate to set aside

What is a “Small Business”?

• One that is independently owned and operated, headquartered in Illinois, and meets the required size status and the following sales limitations:
  • No WHOLESALE business can exceed $13 million in annual sales
  • No RETAIL business can exceed $8 million in annual sales and receipts
  • No CONSTRUCTION business can exceed $14 million in annual sales and receipts
  • No MANUFACTURING business can employ more than 250 persons

Firms are listed in the small business database on the Illinois Procurement Gateway (IPG)

• Annual registration in IPG along with submittal of the company’s annual report is required.
Centralized repository for standard submittal forms (also known as Forms B):
- Financial Disclosure and Conflict of Interest Forms
- Standard Certification Forms, i.e. vendor certifies that it is a legal entity, certifies it is not barred from having a contract, etc.
- Vendor must have an approved registration at the time of bid
- Even with approved registration, Forms B must still be completed and submitted with each bid or proposal
- Registration interfaces to BidBuy registration - one way
- The website can be found at: https://ipg.vendorreg.com
- Login is required for detailed information; however, without logging in, one can still see some items like small business registrations.
BidBuy is the State of Illinois’ e-Procurement System, utilized by the agencies under the Chief Procurement Officer of General Services.

• The Tollway is required to utilize BidBuy for all procurements
• Currently, the Tollway is only accepting electronic bids through BidBuy. Paper bids and bids via fax or email are not accepted.
• Procurement opportunities and awards are listed for the Public to view on the BidBuy website (no login is required)
• Bidders must register in BidBuy to submit Bids to the Tollway
• Listing of Goods and Services Contracts
• Goods and Services Buying Plan
• As-read Solicitation Results
Bidders should refer to the specific solicitation documents for a complete listing of all documents required to be returned with their bid or proposal. Bidders must complete, sign, and upload all required documents with their Quote in BidBuy to be considered responsive. Below is a sample listing of typically-required documents:

- Contract
- Standard Certifications
- FORMS A or FORMS B
  - Bidder must have a valid IPG Registration Number to Submit FORMS B
- Letter of Intent (if applicable)
- BEP / VSB Utilization Plan (if applicable)
- Redacted copy of Bid (if applicable)
- Exceptions to Solicitation Contract Terms and Conditions (if applicable)
- References (if applicable)
- Bid or Performance bond (if applicable)

**AVOID DISQUALIFICATION**

- Ensure to review solicitation documents completely and complete and return all required documents with the Bid/Offer submission in BidBuy
- Late Submittals are not accepted. Ensure to start your quote in BidBuy well in advance of the due date and time to allow time for troubleshooting
AVOID COMMON MISTAKES

✓ Read solicitations in detail and include all required forms

✓ Complete required Financial Disclosures and Conflicts of Interest forms, Standard Certifications, and TIN Page (either Forms A or Forms B must be submitted)

✓ Electronic bids still require a signed offer along with applicable forms to be uploaded

✓ If solicitation contains a BEP and/or a Veteran goal, a U-Plan and LOI must be submitted

✓ Get BEP/Veteran certified and stay current (must certify on an annual basis)

✓ Remember – bid opportunities are price competitive!

✓ Submit on time
QUESTIONS?

• Tollway-Specific Questions?
  • Contact the Solicitation Contact for each individual solicitation.

• BidBuy System-Specific Questions?
  • BidBuy Vendor Help Desk
  • il.bidbuy@Illinois.gov
  • 866-455-2897
The following are applicable to Goods & Services:

Business Enterprise Program (BEP) goal
Veteran Owned Small Business Program (VSB) goal

Required Documentation:

- Vendors must submit a Utilization Plan for each goal program
  - Indicate how they are meeting goal or provide good faith efforts
  - Complete Letter of Intent for each vendor in the plan

Utilization Plan can be found at:
https://www2.illinois.gov/cpo/general/Pages/SolicitationandContractTemplates.aspx

Vendor search of certified firms found at:
https://cms.diversitycompliance.com
The B2GNow is a web-based system that allows vendors to self-manage their contracts through simple web-based forms, which integrate seamlessly with the Tollway’s database and reports. The system is accessible to all governments and their contractors; and includes the following key features:

- Track contracts
- Communicate with contractors by email and fax
- Contractors respond to information requests online by submitting data in standardized, electronic format
- Real-time assessment of contractor performance
- Automatic audit and verification notices
- Track certification applications from submission to completion
- Contact firms quickly using sophisticated outreach tools
- Search the online business directory with keyword and commodity code (NIGP, NAICS) search capabilities
The Automated Compliance Audit Process:

1. First of the Month
   - Prime & Sub notified of discrepancy by email/fax

2. Prime notified by email
   - Prime enters payment data for subs
   - Subcontractor notified by email/fax

3. Subcontractor confirms or rejects payment data

4. Sub confirms

5. Staff Overview

6. Sub Rejects

7. Compliance Audit Complete

Presented on March 22, 2021
Diversity Program System

About the System
Learn more about this system and how it works today
- Information for Vendors
- B2Gnow for Tollway Vendors
- System Training

Upcoming Events
View our upcoming events
- Events

Outreach
Opportunities for vendor involvement
- View Outreach Opportunities

Account Access
- Lookup Vendor accounts or reset user passwords
- Account Lookup
- Forgot Password

State of Illinois Vendor
The very first screen you will see is our Welcome Page.

Welcome to our system!

Our system is designed to make data gathering simpler and faster. Please review the information below before continuing to ensure that you maximize your experience.

Security
- Change your password immediately if someone else set up your account.
- Do not use someone else’s account. Every person must have their own account. If you do not know how to set up a user account, please contact us through the messaging system: from the left menu, click Message, then Contact System Support.

Navigating
- All system functions are available from the menu on the left. Just click any of the topics to view the subtopics. This menu is visible at all times.
- The page you will see after this welcome screen is your dashboard. It provides a quick summary of your assigned records, and identifies if immediate action is required.

Finding Records
- If you need to find a particular record (contract, vendor, user, certification), the best place to start is Search. From the left menu, click Search, then select the type of record you need to find. For tips on searching the system, download the Quick Guide listed below.

Help & Support
- Download the support guide in PDF format: Download Support Guide
- More help options are available from the left menu under Help & Support, including our online help system, a Forums module, and messaging tools.

Do not show this page again.

Continue
After clicking Continue on the Welcome Page you will automatically be taken to your Dashboard. From this page, you can pretty much link to anywhere in the system. The Stat chart in the middle shows you a quick highlight of what is going on with your contracts. The items in RED are issues that need your immediate attention. To immediately address the issues in RED, simply click on the link and it will take you directly to the page where you need to go to resolve the issue.
### Prime Contractor Clicks Incomplete Audits

<table>
<thead>
<tr>
<th>Status</th>
<th>Audit Period</th>
<th>Contract Number &amp; Title</th>
<th>Organization</th>
<th>Paid to Prime</th>
</tr>
</thead>
<tbody>
<tr>
<td>Incomplete</td>
<td>April 2015</td>
<td>Test Contract: Test Contract</td>
<td>Milwaukee Public Schools</td>
<td>Pending</td>
</tr>
<tr>
<td>Incomplete</td>
<td>April 2015</td>
<td>Pay Or Play Test Contract</td>
<td>City of Houston</td>
<td>Pending</td>
</tr>
<tr>
<td>Incomplete</td>
<td>April 2015</td>
<td>MKE 123: MKE Test</td>
<td>City of Milwaukee</td>
<td>Pending</td>
</tr>
<tr>
<td>Incomplete</td>
<td>April 2015</td>
<td>KP3333: Kaiser Training</td>
<td>Kaiser Permanente National Facilities Services</td>
<td>Pending</td>
</tr>
<tr>
<td>Incomplete</td>
<td>April 2015</td>
<td>JTA333: JTA Training Contract</td>
<td>Jacksonville Transportation Authority</td>
<td>Not reported</td>
</tr>
<tr>
<td>Incomplete</td>
<td>April 2015</td>
<td>123456789: JC- Test1000</td>
<td>Los Angeles County Metropolitan Transportation Authority</td>
<td>Not reported</td>
</tr>
<tr>
<td>Incomplete</td>
<td>April 2015</td>
<td>123-Training: Bridge Construction Project</td>
<td>City of Cleveland</td>
<td>Not reported</td>
</tr>
</tbody>
</table>
Prime Contractor Reports Subcontractor Payments

Audit Information
- Time Period: April 2015
- Date & Time Posted: Local: 5/1/2015 6:01:37 AM CDT
- System: 5/1/2015 6:01:37 AM CDT

Submit a response for each item listed below by clicking each link. It is possible that some actions are not available at a specific time. As the prime contractor your responsibility is to report payments made to subcontractors.

Audit Actions
- Prime Contractor: Report 3 subcontractor payments due by 5/31/2015 audit lock on 6/30/2015

Compliance Officer Information
- Contact Person: Milwaukee Conversion User
- Organization: City of Milwaukee
- User Number: 30000038-003

Buyer/Project Manager Information
- Contact Person: Contract Administrator
- Department: Milwaukee Default Buyer Department
- User: 10000996-001
# Reporting Subcontractor Payments

## Prime Contractor Submits All Sub Payments

The Prime Contractor has submitted all payments to subcontractors for April 2015. The following table provides details of the payments:

### Subcontractor Payments for April 2015

<table>
<thead>
<tr>
<th>Subcontractor</th>
<th>Certified</th>
<th>Type</th>
<th>Inc. in Goal</th>
<th>Actions</th>
<th>Paid Amount in Apr 2015</th>
<th>Confirmed by Sub</th>
<th>Total To April 2015</th>
<th>Contract Goal</th>
<th>Actual Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sub Flooring, LLC</td>
<td>Sub</td>
<td>100%</td>
<td>HBE</td>
<td>Submit Response</td>
<td>$2,200.00</td>
<td>--</td>
<td>$2,200.00</td>
<td>5.792%</td>
<td>0.211%</td>
</tr>
<tr>
<td>Sub Trucking Company</td>
<td>Sub</td>
<td>100%</td>
<td>HBE</td>
<td>Submit Response</td>
<td>-$1,300.00</td>
<td>--</td>
<td>-$1,300.00</td>
<td>5.523%</td>
<td>-0.125%</td>
</tr>
<tr>
<td>Sprinkles Car Wash</td>
<td>Sub</td>
<td>100%</td>
<td>HBE</td>
<td>Submit Response</td>
<td>$3,500.00</td>
<td>--</td>
<td>$3,500.00</td>
<td>0.762%</td>
<td>0.336%</td>
</tr>
</tbody>
</table>

Click the subcontractor name to view payment history for this contract. Click contact person's name to send them a message.

### Subcontractor Payment Information

<table>
<thead>
<tr>
<th>Subcontractor</th>
<th>Total Through January 2013</th>
<th>Payment for February 2015</th>
<th>Payment Date &amp; Prompt Payment within 7 Days</th>
<th>Payment Details &amp; Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sub Flooring, LLC</td>
<td>$2,200.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sub Trucking Company</td>
<td>$2,200.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sprinkles Car Wash</td>
<td>$3,500.00</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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Presented on March 22, 2021
Prime Contractor Submits Payments Individually

### Subcontractor Payments for February 2010

<table>
<thead>
<tr>
<th>Subcontractor</th>
<th>Certified</th>
<th>Type</th>
<th>Inc.</th>
<th>Govt.</th>
<th>Required</th>
<th>Paid Amount in February 2010</th>
<th>Confirmed By Sub</th>
<th>Total To February 2010</th>
<th>Contract Price</th>
<th>Actual Paid</th>
<th>% Paid</th>
</tr>
</thead>
<tbody>
<tr>
<td>SubChains, LLC</td>
<td>Yes</td>
<td>Sub. 100%</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>$14,000.00</td>
<td>Not Reported</td>
<td>$14,000.00</td>
<td>12.00%</td>
<td>12.00%</td>
<td>12.00%</td>
</tr>
</tbody>
</table>

**Audit Information**

Enter the audit amount for the designated time period. You can attach files or add comments, if necessary.

**Amount PAID for April 2015**

- **Payment Date:** Enter payment date if you made a payment for April 2015.
- **Frequent Payment:** Select a choice if you made a payment for April 2015:
  - Yes: the subcontractor was paid within 7 days of payment from City of Milwaukee.
  - No: the subcontractor was not paid within 7 days of payment from.
  - N/A: we cannot determine if the subcontractor was paid promptly.

**Payment Details**

Enter details of PAID check numbers (or ACH references) and amounts for April 2015. This information is optional but will speed up the confirmation process. Payment details are displayed to Sub Flooring, LLC.

**Supporting Documents**

Attached documents are not visible to Sub Flooring, LLC.

**Comments**

(Optional) These comments are visible ONLY to your compliance officer. They are not visible to Sub Flooring, LLC.
**Subcontractor Responds to Prime’s Payment Amounts**

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### Audit Information

- **Audit Time Period**: April 2015

### Prime Information

- **Prime Contractor**: Prime Contracting, Inc.
- **Prime Vendor Number**: 200006279

### Previous Payment Information

- **Total Through April 2015**: $10,600.00

### Prime Payment Information

- **Amount Paid TO Prime for April 2016**: $685,000.00 by City of Milwaukee to Prime Contracting, Inc.
- **Date Paid TO Prime**: 5/1/2015

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**Audit Information**

- **Amount Reported by the prime contractor for April 2015 as PAID to You**: $5,000.00
  - **Payment Detail Provided by Prime**:
    - **Ck #**: 1256
    - **Inv #**: 789
    - **Date**: April 2, 2015

**Confirm Reported Amount?**

- Show all options and fields
  - Correct - the amount reported by the prime contractor as PAID to us is correct ($5,000.00)
  - Incorrect - the amount reported by the prime contractor as PAID to us is not correct.

**Final Payment?**

- Show all options and fields
  - No - our work on this contract continues
  - Yes - this is our last payment for this contract.
  - N/A - we have not begun work on this project or we have not been paid yet for our work.

**Is Prime Withholding Retainage?**

- Show all options and fields
  - No
  - Yes

**Attach File(s)**

- Attach File

**Public Comments**

> These comments are visible to the compliance officer and the prime contractor.
Action Items

- By the 25th of the month, all payment information for subcontractors must be entered and confirmed for the previous month in B2Gnow (this also includes zero values)

- If the contract value of a BEP/VSB Subcontractor is amended you will be required to submit revised utilization plan/form reflecting the change(s)

- Please note, if a Prime Contractor wishes to terminate a contract or decrease the contract value of a BEP/VSB Subcontractor, a request MUST be submitted on company letterhead detailing the reason for the change(s)
Vendor Payment Compliance

- Failure to enter and/or confirm payments monthly
- Missing Subcontractor profiles
- Discrepancies created as a result of incorrect payment entries
- Contract compliance schedule/form revisions not reported/reflected in the system
- Company profile/user contact information not updated
B2Gnow Training Classes & Videos

The system can be accessed at: https://iltollway.diversitysoftware.com. For assistance with using the B2Gnow system:

- **Locate the “Help & Tools” icon and an expanded list will appear. Select either “Training Classes” or “Training Videos”**

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**Training Classes**

**Training Videos**