

ATI Procurement Annual Report AY15/16

1. Campus

How to Complete and Submit this Report Form

The instructions on THIS page are about how to NAVIGATE the report INTERFACE.

For instructions and worksheets for compiling the report CONTENT:

Go to [ATI Annual Reports Instructions and Worksheets \(opens the Login page in a new window\)](#).

We recommend that you print out the table on page 2 of the Annual Report Instructions document that details the status levels.

Submission Due Date = November 15, 2016

About the Online Report Form

You must have JavaScript enabled.

The application displays much better in Firefox or Chrome than in Internet Explorer (IE).

****NEW This Year** - Requirements from Coded Memo AA-2015-22**

Documenting Progress Using the ATI Annual Report

As detailed in the Coded Memo AA 2015-22, when completing this Annual Report:

Report on the status of all Goals and Success Indicators. Consult the status level definitions – each one has a set of criteria that must be met. Campus and Chancellor's Office will provide evidence of Status Levels in their report. Note: Use the REQUIRED Evidence/Comments field provided for each Success Indicator to record your evidence.

Document the commitment to work on specific Success Indicators for the following year.

Submit the Annual Report signed by the ATI Sponsor affirming that the ATI Plan was reviewed and revised and that the Report data is accurate. Note: Textboxes are provided at the end of the Report for these REQUIRED ATI Sponsor affirmations.

Data Entry

You can copy and paste from Word documents into the report form.

Next button – Saves any data you have entered on a page and moves you to the next page. Note: To save information you've entered when you can't or don't want to move forward (use Next), use Back (see below).

Back button – Saves data you've entered on a page even if all required fields have not been completed. Note: If you get an "incomplete information" error message that prevents you from using Back, enter dummy information into the required fields and then click Back. The dummy information can be corrected later.

****Warning: Exiting a page without clicking either Next or Back will cause you to lose any data you've entered on that page.****

Submit button – Cannot be used until the "This report has been approved by:" box has been completed. Once submitted, the report can no longer be accessed.

F5 – Using "F5" to refresh a page takes you back to the first (Campus Name) page.

Multiple Users

The report URL must be forwarded to anyone who needs to enter data into this report form.

More than one person can use the report URL, but not at the same time.

Clicking on the URL takes you to the last page on which any previous user entered and saved data.

Known Accessibility Issues and Workarounds

Dropdown boxes do NOT have descriptive titles. Table headings suffice to describe dropdown boxes and text fields in the table.

For all tables, JAWS does not detect or read the column headers for the pull-down fields in the first row. Those in subsequent rows are detected and read correctly, as are the Comments fields in all rows. JAWS users should use the Read Cell function (Ctrl+Alt+Number5).

All tables report having twice as many columns as are visually present. For example, JAWS indicates that the Success Indicators table has 12 (not 6) columns.

The column and row headers that together provide the text description for all embedded text fields are unreadable by JAWS unless users use the Read Cell function (Ctrl+Alt+Number5).

Using F5 to refresh a page takes users back to the first (Campus Name) page, but JAWS continues to read the page users were on before they refreshed unless they use the Refresh Virtual Cursor function (Insert+Esc).

Tab order does not mirror visual presentation but the order is logical (e.g., Back follows Next in the tab order though it precedes it visually).

Assistance

If you have any questions or concerns regarding this report please contact:

ATI via email at ati@calstate.edu.

Cheryl Pruitt at 562-760-1393.

Campus Name - Required

Chico

2. 1.0 Procurement Procedures

1.0 Procurement Procedures

For instructions and details on how to complete and submit this report online, see the email containing the report URL or the first page (Campus Name) of this report form.

Goal 1.0: An ATI Electronic and Information Technology (E&IT) Procurement Plan, documents, forms, and other materials to support 508 procurements at the campus are created and published.

1.0 Goal Status - Required

Managed

Key Accomplishments AY15/16 (Please list 3 to 5)

Accomplishment 1 : Launch online E&IT review process using Team Dynamics software - Aug 2015

Accomplishment 2 : Train buyers - July 2015

Accomplishment 3 : 100% review of all E&IT procurements in FY 15/16 regardless of cost

Key Plans AY16/17 (Please list 3 to 5)

Plan 1 : Update procurement plan

Plan 2 : Create and publish a list of pre-approved E&IT products

Plan 3 : Streamline ITPR review process/review new software enhancements

Comments

1.0 Success Indicators

	Status -- Required	Year Started	Worked on in AY15/16	Will work on in AY16/17	REQUIRED Evidence/Comments
			Yes	Yes	
1.1 Developed and published					

and published an Accessible ATI E&IT Procurement Plan.	Managed	2009	X	X	Will finish in 2016/17 and publish to website
1.2 Developed and published a document that defines what products are categorized as Section 508 E&IT procurements.	Managed	2009	X		https://support.csuchico.edu/TDClient/Requests/SerID=10028
1.3 Developed a procedure for procuring E&IT products based on the product/service impact criteria.	Established	2014	X	X	Impact matrix is used to determine level of review
1.4 Developed a documented process to determine the level/complexity of 508 evaluation that will be required for new procurements and/or renewals.	Defined	2014	X	X	Define the level of review for each level of impact and to ATI website
1.5 Developed a process for all competitive bid procurements that require an evaluation of Section 508 compliance.	Optimizing	2009			RFP template & evaluation criteria have ATI language
1.6 Developed a process for all non-competitive bid procurements that require an evaluation of Section 508 compliance.	Optimizing	2009	X	X	https://support.csuchico.edu/TDClient/Requests/SerID=10028
1.7 Developed a process for all purchase card purchases that require an evaluation of Section 508 compliance.	Established	2013	X	X	During 100% audit of p-card statements, items that require evaluation are identified and ITPR is completed as necessary. Exceptions are granted in advance of p-card purchase if ITPR has been completed and approved purchase.
1.8 Documented a process used to					

	Defined	2013		X	Process not yet documented
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Collaborating on Goal 1 - Procurement Procedures

	1.0 Success Indicator Number	Assistance Requested	Assistance Offered	Comments
		Yes	Yes	
1				
2				
3				
4				
5				

3. 2.0 Staffing or Role Definition

2.0 Staffing or Role Definition

For instructions and details on how to complete and submit this report online, see the email containing the report URL or the first page (Campus Name) of this report form.

Goal 2.0: ATI procurement team is fully staffed with clearly defined roles for processing E&IT procurements.

2.0 Goal Status - Required

Managed

Key Accomplishments AY15/16 (Please list 3 to 5)

Accomplishment 1 : Launch online E&IT review process which assigns roles for each E&IT review - Aug 2015

Accomplishment 2 : Re-evaluate staffing requirements after the launch of online E&IT process

Key Plans AY16/17 (Please list 3 to 5)

Plan 1 : create pre-approved E&IT list to reduce ITPR workload

Plan 2 : continue to work with other CSU campuses on VPAT testing

Comments

2.0 Success Indicators

	Status -- Required	Year Started	Worked on in AY15/16	Will work on in AY16/17	REQUIRED Evidence/Comments
			Yes	Yes	
2.1 Established a group that meets on a regular basis to discuss accessible procurement topics.	Managed	2009	X	X	Meetings are scheduled and attended by ATI procurement working group. Future plans to formalize action items that come out of the meetings
2.2 Identified contact person(s) and process for vendors, purchase requestors, and staff to ask questions about procurements.	Optimizing	2009	X	X	Trained over 100 campus users on campus ITPR process and continue to offer trainings.
2.3 Documented in writing who is responsible for each component of the accessible procurement process (e.g., Who does the purchase request? Who interacts with the EIT product/service provider on accessibility questions? Who does	Optimizing	2009	X	X	Team Dynamix workflow defines roles for all steps of the process.

Collaborating on Goal 2 - Staffing or Role Definition

	2.0 Success Indicator Number	Assistance Requested	Assistance Offered	Comments
		Yes	Yes	
1				
2				
3				

4. 3.0 Exemptions Process

3.0 Exemptions Process

For instructions and details on how to complete and submit this report online, see the email containing the report URL or the first page (Campus Name) of this report form.

Goal 3.0: A well-documented process has been established and is used for exemptions to E&IT procurements.

3.0 Goal Status - Required

Defined

Key Accomplishments AY15/16 (Please list 3 to 5)

Accomplishment 1 : Document exemption process

Key Plans AY16/17 (Please list 3 to 5)

Plan 1 : Formalize and publish the exemption process

Comments

3.0 Success Indicators

	Status -- Required	Year Started	Worked on in AY15/16	Will work on in AY16/17	REQUIRED Evidence/Comments
			Yes	Yes	
3.1 Established a process for approving exemptions.	Defined		X	X	process is defined
3.2 Documented the exemption process, posted it on public website, and have communicated process to campus.	Defined		X	X	plan to formalize and post exemption process
3.3 Documented a process that ensures that supplementary accommodations can be put in place when exemptions are warranted.	Defined		X	X	EAAAP are completed when necessary and included in the E&IT documentation. Copies of EAAAP are given to the users
3.4 Established a follow-up process for communicating with EIT product/service provider and purchase requesters when a procurement is moved forward without total resolution of the accessibility status of the product.	Defined		X	X	Purchase requester is contacted based on impact level

Collaborating on Goal 3 - Exemptions Process

	3.0 Success Indicator Number	Assistance Requested	Assistance Offered	Comments
		Yes	Yes	
1				
2				
3				
4				

5. 4.0 Equally Effective Access Plans

4.0 Equally Effective Access Plans

For instructions and details on how to complete and submit this report online, see the email containing the report URL or the first page (Campus Name) of this report form.

Goal 4.0: Equally Effective Access Plans are created for E&IT products that are not fully 508 compliant.

4.0 Goal Status - Required

Established

Key Accomplishments AY15/16 (Please list 3 to 5)

Accomplishment 1 : EAAAP's were created for many E&IT products based on impact

Accomplishment 2 : Documented EAAAP processes using a matrix based on impact

Key Plans AY16/17 (Please list 3 to 5)

Plan 1 : Formalize and publish EEAAP matrix and add to training

Comments

4.0 Success Indicators

	Status -- Required	Year Started	Worked on in AY15/16	Will work on in AY16/17	
			Yes	Yes	
4.1 Documented a process that outlines when an equally effective alternate access plan is necessary.	Defined	2009	X	X	matrix defines when EEAAP is required
4.2 Established a process with roles assigned for all parts of creating an equally effective alternate access plan.	Defined	2009	X		roles assigned
4.3 Established a process that tracks how many equally effective alternate access plans have been created.	Managed	2009	X		Team Dynamix reporting and dashboard https://app.p.r=eyJrljoiMDkxNDI0M2ltZTdmNS00ZTQ3LWEwYTkt
4.4 Established a process to ensure that accommodations were provided.	Initiated	2014	X	X	working on a process

Collaborating on Goal 4 - Equally Effective Access Plans

4.0 Success Indicator Number	Assistance Requested	Assistance Offered	Comments
	Yes	Yes	
1			
2			
3			
4			

6. 5.0 Training

5.0 Training

For instructions and details on how to complete and submit this report online, see the email containing the report URL or the first page (Campus Name) of this report form.

Goal 5.0: All parties involved in E&IT procurement have been trained, and a continual training program is in place.

5.0 Goal Status - Required

Managed

Key Accomplishments AY15/16 (Please list 3 to 5)

Accomplishment 1 : Began to offer regular ATI procurement training in person-

Accomplishment 2 : ATI Designee attended appropriate professional development courses/programs

Accomplishment 3 : CO ATI Staff in-person training for Procurement Staff - Cheryl Pruitt Fall 2015

Key Plans AY16/17 (Please list 3 to 5)

Plan 1 : continue to update and improve the in-person training

Comments

5.0 Success Indicators

	Status -- Required	Year Started	Worked on in AY15/16	Will work on in AY16/17	REQUIRED Evidence/Comments
			Yes	Yes	
5.1 Established and deployed new employee orientation training materials that provide overview of Section 508 requirements and where to get more information.	Defined	2014			working on attendance at new faculty training
5.2 Established and deployed training program for purchase requestors and administrative support staff.	Optimizing	2014	X	X	continue to improve in-person training classes which are offered at least once/semester
5.3 Established and deployed training program for Information Technology Staff.	Defined	2014			.
5.4 Established and deployed training program for Buyers (procurement staff).	Managed	2010			in the event there are new Buyers, they are given ITPR training.
5.5 Established and deployed training for all purchase card holders.	Defined	2014			ITPR process is addressed in p-card training.
5.6 Established a plan that provides resources for the Section 508 Compliance officer and ATI Designee or other Designee to participate in professional development and continuing education opportunities.	Established	2014	X		ATI designee is provided and participates in ongoing professional development
5.7 Collected feedback from training (effectiveness, knowledge retention, etc.).	Defined	2015	X	X	Feedback from in-person training is gathered. Knowledge retention is not assessed
5.8 Established methods for retraining individuals and departments to refresh knowledge of the E&IT procurement process.	Not Started				.

Collaborating on Goal 5 - Training

	5.0 Success Indicator Number	Assistance Requested	Assistance Offered	Comments
		Yes	Yes	
1				
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5				

7. 6.0 Outreach (Communications)

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For instructions and details on how to complete and submit this report online, see the email containing the report URL or the first page (Campus Name) of this report form.

Goal 6.0: All individuals on campus involved in the purchasing of goods are knowledgeable about Section 508 in the context of E&IT procurement.

6.0 Goal Status - Required

Established

Key Accomplishments AY15/16 (Please list 3 to 5)

Accomplishment 1 : Provide regular training

Accomplishment 2 : Publicize ATI website, IT Procurement Review process in multiple venues

Key Plans AY16/17 (Please list 3 to 5)

Plan 1 : continue to offer in-person training

Comments

6.0 Success Indicators

	Status -- Required	Year Started	Worked on in AY15/16	Will work on in AY16/17	REQUIRED Evidence/Comments
			Yes	Yes	
6.2 Established a process for working collaboratively with vendors during the procurement process to asses and improve the accessibility of their product (i.e. VPAT review process, Accessibility Roadmap).	Defined	2014	X	X	purchasers and evaluators interface with vendors during the ITPR process
6.3 Established an ongoing general campus communication that promotes E&IT procurement awareness.	Defined	2009	X	X	ITPR trainings are marketed regularly

Collaborating on Goal 6 - Outreach (Communications)

	6.0 Success Indicator Number	Assistance Requested	Assistance Offered	Comments
		Yes	Yes	
1				
2				

8. 7.0 Evaluation and Monitoring

7.0 Evaluation and Monitoring

For instructions and details on how to complete and submit this report online, see the email containing the report URL or the first page (Campus Name) of this report form.

Goal 7.0: Campus has established a continual evaluation process with standard forms and procedures. Feedback from the process along with direction is provided to training, outreach, and other groups involved in E&IT procurements.

7.0 Goal Status - Required

Defined

Key Accomplishments AY15/16 (Please list 3 to 5)

Accomplishment 1 : Enhance metrics reporting in TeamDynamix

Accomplishment 2 : Weekly report of ATI procurement reviews

Key Plans AY16/17 (Please list 3 to 5)

Plan 1 : Review metrics with Procurement Team quarterly

Comments

7.0 Success Indicators

	Status -- Required	Year Started	Worked on in AY15/16	Will work on in AY16/17	REQUIRED Evidence/Comments
			Yes	Yes	
7.4 Established metrics to evaluate the effectiveness of the ATI procurement process and procedures process.	Defined	2014	X	X	some metrics are defined
7.5 Established metrics to evaluate the effectiveness of the Equally Effective Alternate Access process.	Initiated	2014		X	.
7.6 Established metrics to evaluate the effectiveness of campus training process.	Initiated	2014	X		training feedback is collected after each class
7.7 Establish metrics to evaluate the effectiveness of campus outreach process.	Not Started	2014			.

Collaborating on Goal 7 - Evaluation and Monitoring

	7.0 Success Indicator Number	Assistance Requested	Assistance Offered	Comments
		Yes	Yes	
1				
2				
3				
4				

9. 8.0 Experience/Implementation

8.0 Experience/Implementation

For instructions and details on how to complete and submit this report online, see the email containing the report URL or the first page (Campus Name) of this report form.

Goal 8.0: Campuses have sufficient experience and expertise in completing E&IT procurements.

8.0 Goal Status - Required

Managed

Key Accomplishments AY15/16 (Please list 3 to 5)

Accomplishment 1 : Improved data collection and reporting processes for ATI procurements through Team Dynamix
 Accomplishment 2 : share data collected with training classes and with ATI steering committee
 Accomplishment 3 : campus is recognized as a leader in ATI procurement in the CSU system

Key Plans AY16/17 (Please list 3 to 5)

Plan 1 : continue to streamline the process and offer trainings to the campus

Comments

8.0 Success Indicators 8.1-8.3

	Response for AY15/16 - Required	REQUIRED Evidence/Comments
8.5 What is the total number of E&IT reviews?	537	ITPR's completed
8.6 What is the total percentage of EEAAP's?	25%	EAAAP's completed as needed
8.7 What is the total number of exemptions/exceptions?	0	Our campus reviewed ALL E&IT products regardless of cost. This year we will work to identifying the items that could be granted an exemption/exception (whitelist).

Collaborating on Goal 8 - Experience/Implementation

	8.0 Success Indicator Number	Assistance Requested	Assistance Offered	Comments
		Yes	Yes	
1				
2				
3				

10. Contributors

Final Comments

Contributors

	First Name	Last Name	Title	Email Address	Phone Number
1	Scott	Kodai	Manager of Support Services	skodai@csuchico.edu	530-898-
2	Sara	Rumiano	Dir Procurement & Contract Services	srumiano@csuchico.edu	530-898-5270
3	Brooke	Banks	Interim Chief of Staff	bfbanks@csuchico.edu	530-898-5201
4					
5					

Required - Accuracy of Report Data

Sandy Parsons for Drew Calandrella

Required - Updated Campus Plan Declaration

Sandy Parsons for Drew Calandrella

Required - ATI Sponsor to receive submission notification and PDF of report responses:

Sandy Parsons

Required

skparsons@csuchico.edu

Reminder: Once you click the Submit button, this report can no longer be accessed.

11. Thank You!

Thank you for completing and submitting your ATI Procurement Annual Report AY15/16.

****Warning: Please do NOT use your browser Back button from this page to return to any previous pages in this report. Doing so could compromise all the data you've entered and require you to reenter it. ****