



Commonwealth of Virginia

FY2025 Annual SWaM Procurement Plan for - William & Mary

1 AGENCY INFORMATION

1. Agency/Department/Institution Name:

William & Mary

2. Secretariat:

Education

3. Name of Current Secretary:

Aimee Rogstad Guidera

4. Agency Code:

204

5. Agency Head:

a. Is this the same Agency Head reported on the 2024 SWaM Plan?

Yes

b. Name:

Katherine Rowe

c. Phone Number:

(757) 221-1693

d. Email Address:

president@wm.edu

6. Director of Procurement:

a. Is this the same Director of Procurement reported on the 2024 SWaM Plan?

Yes

b. Name:

Marra Austin

c. Title:

AVP Supply Chain Services

d. Phone Number:

(757) 221-7636

e. Email Address:

maaustin@wm.edu

7. Purchases and Supply Division Lead Purchaser:

a. Is this the same Lead Purchaser reported on the 2024 SWaM Plan?

Yes

b. Name:

Marra Austin

c. Title:

AVP Supply Chain Services

d. Phone Number:

(757) 221-7636

e. Email Address:

maaustin@wm.edu

8. Building and/or Construction Division Procurement Officer (if applicable):

a. Is this the same Procurement Officer reported on the 2024 SWaM Plan?

Yes

b. Name:

John Rodriguez, W&M_Cindy Hornsby, VIMS

c. Title:

FM Projects Procurement Manager

d. Phone Number:

(757) 221-2201

e. Email Address:

jrodriguez01@wm.edu

9. SWaM Champion:

a. Is this the same SWaM Champion reported on the 2024 SWaM Plan?

Yes

b. Name:

Marra Austin

c. Title:

AVP Supply Chain Services

d. Phone Number:

(757) 221-7636

e. Email Address:

maustin@wm.edu

2 SWaM GOALS

Directions: Enter the percentage of Fiscal Year 2025 discretionary spending the Agency, Department, or Institution is aspiring to achieve in each individual small business certification category. The system calculates the Overall SWaM participation goal based on the data entered in each field. Previous years Goals and Actuals are auto generated from the Expenditure Dashboard and are provided as a reference point for your annual trends

%	Overall SWaM Participation	MB	WB	Micro	SDV*	SB	ESO	8A	EDWOSB	WOSB	FSDV
FY2025 GOAL	42.00	4.00	6.00	5.00	3.00	19.00	1.00	1.00	1.00	1.00	1.00
FY2024 GOAL	42.00	4.00	7.00	5.00	3.00	18.00	1.00	1.00	1.00	1.00	1.00
FY2024 ACTUAL	50.18	3.43	5.25	3.59	0.01	37.90	0.00	0.00	0.00	0.00	0.00
FY2023 GOAL	42.00	4.00	7.00	4.00	3.00	19.00	1.00	1.00	1.00	1.00	1.00
FY2023 ACTUAL	47.14	4.57	4.21	6.15	0.00	32.21	0.00	0.00	0.00	0.00	0.00
FY2022 GOAL	42.00	1.00	7.00	4.00	3.00	22.00	1.00	1.00	1.00	1.00	1.00
FY2022 ACTUAL	40.49	1.35	4.18	3.38	0.00	31.58	0.00	0.00	0.00	0.00	0.00

*According to §2.2-4310.2 executive branch agency's goals under § 2.2-4310 for participation by small businesses shall include within the goals a minimum of three percent (3%) participation by service-disabled veteran-owned businesses as defined in § 2.2-2000.1 and 2.2-4310 when contracting for goods and services.

3 AGENCY SWaM PROGRAM PROCEDURES ASSESSMENT

1. Does your agency have a written program to facilitate the participation of small businesses, businesses owned by women, minorities, and service-disabled veterans, and employment services organizations in procurement transactions?

Yes

2. Who monitors, reviews, and implements your agency SWaM Program?

Director of Procurement; SWaM Champion; Purchases and Supply Division Lead Purchaser

a. If Other, please specify the content

3. How often do procurement personnel train on your agency written SWaM program and/or procurement standard operating procedures?

Bi-annually

a. If Other, please specify the content

4. Did any Prime contractors required to report SWaM business utilization have any challenges with monthly reporting in accordance with APSPM Appendix B, Section II, item #36, subsections A, B, and C?

No

5. Goods and Services

a. In FY24, did your agency experience challenges awarding Micro Business Set-Aside Award priority for Goods or Services?

NA

I. If yes, choose all that apply:

b. Did your agency have solicitations for Goods and Services with Micro Business Set-Aside award priority that went unfulfilled in FY24?

NA

I. If yes, choose all that apply to the reasons these solicitations went unfulfilled:

c. In FY24, did your agency experience challenges awarding Small Business Set-Aside Award priority for Goods or Services?

NA

I. If yes, choose all that apply:

d. Did your agency have solicitations for Goods and Services with Small Business Set-Aside award priority that went unfulfilled in FY24?

NA

I. If yes, choose all that apply to the reasons these solicitations went unfulfilled:

6. Professional Services (A&E)

a. In FY24, did your agency experience challenges awarding Micro Business Set-Aside Award priority for Professional Services?

NA

I. If yes, choose all that apply:

b. Did your agency have solicitations for Professional Services with Micro Business Set-Aside award priorities that went unfulfilled in FY24?

NA

I. If yes, choose all that apply to the reasons these solicitations went unfulfilled:

c. In FY24, did your agency experience challenges awarding Small Business Set-Aside Award priority for Professional Services?

NA

I. If yes, choose all that apply:

d. Did your agency have solicitations for Professional Services with Small Business Set-Aside award priority that went unfulfilled in FY24?

NA

I. If yes, choose all that apply to the reasons these solicitations went unfulfilled:

7. Construction

a. In FY24, did your agency experience challenges awarding Micro Business Set-Aside Award priority for Construction?

NA

I. If yes, choose all that apply:

b. Did your agency have solicitations for Construction with Micro Business Set-Aside award priorities that went unfulfilled in FY24?

NA

I. If yes, choose all that apply to the reasons these solicitations went unfulfilled:

c. In FY24, did your agency experience challenges awarding Small Business Set-Aside Award priority for Construction?

NA

I. If yes, choose all that apply:

d. Did your agency have solicitations for Constructions with Small Business Set-Aside award priority that went unfulfilled in FY24?

NA

I. If yes, choose all that apply to the reasons these solicitations went unfulfilled:

4 SMALL BUSINESS DEVELOPMENT AND OUTREACH DATA COLLECTION

1. Did your agency contact DSBSD for SWaM Certification support?

Yes

2. Did your agency have any open house events in FY24 for SWaM businesses?

Yes

3. Did your agency conduct one-on-one meetings in FY24 with SWaM businesses to discuss policies, procedures, and potential business opportunities?

Yes

4. In FY24, did procurement officials attend training events dedicated to broadening SWaM business participation in state procurement?

Yes

a. If yes, please provide the name of the organization that hosted the training

CNU SWaM Expo - VAGP hosted a supplier diversity session led by City of Virginia Beach

5. Were there any SWaM business outreach events hosted by your agency in FY24?

Yes

6. Does your agency have any SWaM Outreach events planned for FY25?

Yes

7. How does your agency advertise SWaM business opportunities? (Select all that apply)

eVA; agency webpage; Chambers of Commerce

8. In the table below, identify the frequency with which procurement personnel used or referred businesses to the following DSBSD services. (DO NOT ACCOUNT FOR SWaM DIRECTORY OR EXPENDITURE DASHBOARD USAGE/UTILIZATION)

Services Provided by DSBSD	FREQUENCY: NEVER, RARELY, SOMETIMES, FREQUENTLY
Certification	Sometimes
Guest Speaking	Rarely
Reporting underperforming Certified Micro/Small Businesses	Never
Scaling4Growth	Never
Business Development/Technical Assistance	Never
Sourcing	Rarely
SWaM Directory/Expenditure Dashboard Help	Sometimes
Training	Rarely
Virginia Small Business Finance Authority	Never

5 FEEDBACK

1. Please identify barriers or limitations to SWaM participation your agency experienced in FY24:

While William & Mary doesn't utilize the set-aside requirements as noted in the above responses; the university does allow for a direct SWaM award up to \$200,000 with a SBSD certified SWaM firm if the procurement officer determines price fair and reasonable. This streamlined option is heavily communicated with the campus community and has been utilized in various areas as a benefit if an existing contract is unavailable.

Completed by:

Signature: Marra Austin

Date: 2024-09-20

Approved by:

Signature: Katherine Rowe

Date: 2024-09-24