



**Ohio**

**Department of  
Administrative Services**

# Agency Procurement Officers Meeting

March 13, 2019

1

We'll begin promptly at 1:00

2

The meeting's audio is being broadcast through your computer



3

Please verify your computer's speakers are on

4

Questions submitted on-line will be answered after each presentation or during open discussion



# Office of Procurement Services Updates

Kelly Sanders, Chief Procurement  
Officer

# Office of Procurement Services Updates

## Staff Members

### General Services Division

- John Levitt has joined DAS as the GSD Deputy Director
- Olivia Worthington has joined DAS as an intern
- Alexandra Hensley has joined DAS as an intern

### Medical and Lab Goods and Services Team

- Will Barr has left state service
- Jim Oswald has joined the team as a Standards Analyst

### Maintenance, Repair, Operations and Security Team

- Tom Nelson has joined the team as a Standards Analyst

### Procurement Programs and Support

- Tonya Prickett is now managing this unit, which is comprised of the Bid Desk, Cooperative Purchasing Program, MBE/EDGE, and Community Rehabilitation Program

# Office of Procurement Services Updates

## State Procurement Manual

- Updated manual is available on [procure.ohio.gov](http://procure.ohio.gov)

## PM-01 and PM-02

- January 24 Presentation/Webinar slides and Q&A available on [procure.ohio.gov](http://procure.ohio.gov)
- PM-01 training available on ELM – coming soon!

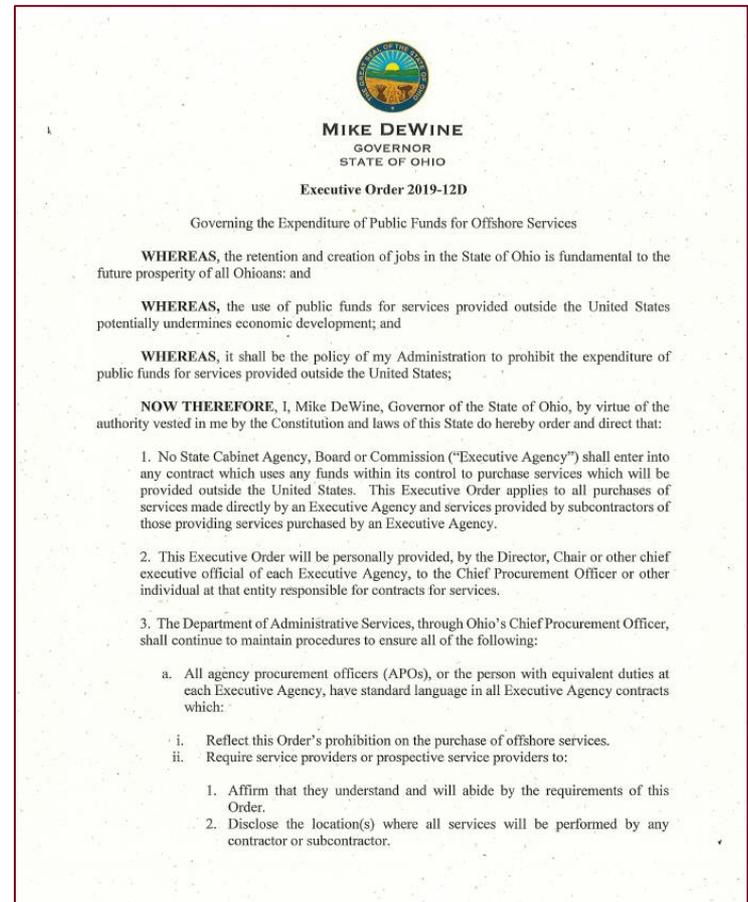
## OPS Organization

- Surface Road consolidation

# Office of Procurement Services Updates

## Executive Order 2019-12D

- Signed by Governor DeWine on March 4
- Continuation of previous executive orders prohibiting purchase of offshore services
- APOs are required to “...confirm that all quotations, statements of work, and other such proposals for services affirm this Order’s prohibition on the purchase of offshore services and include all of this Order’s disclosure requirements.”

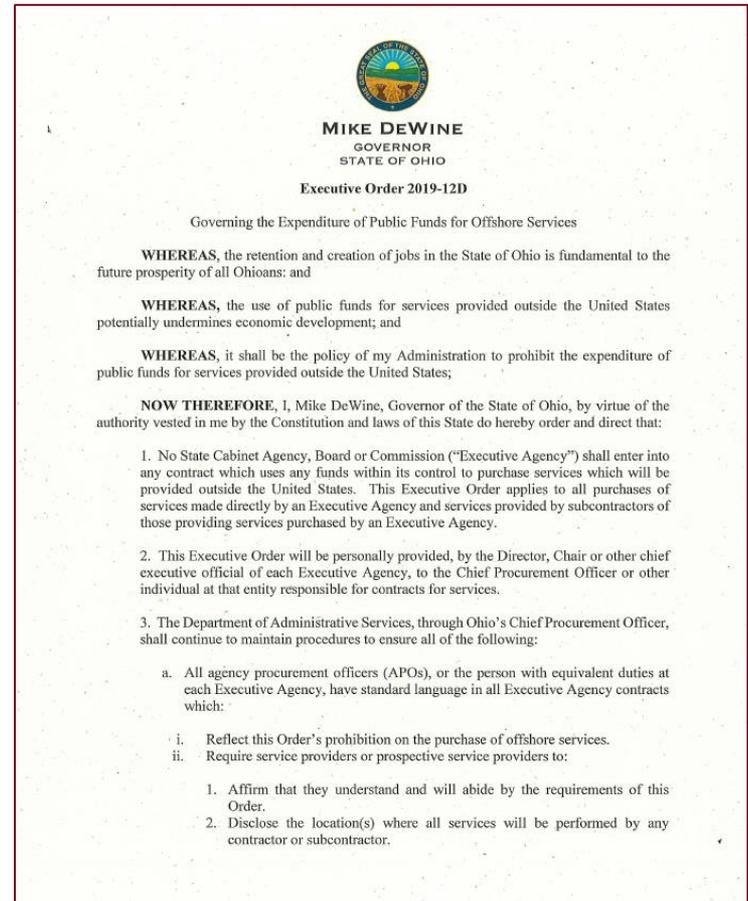


# Office of Procurement Services Updates

## Executive Order 2019-12D

The Order does not apply to:

- Services necessary to support efforts to attract jobs and business to Ohio
- Academic, instructional, educational, research or other services necessary to support the international missions of Ohio's public colleges/universities
- Situations in which the DAS Director determines there's an emergency or it's necessary to waive the Orders' requirements



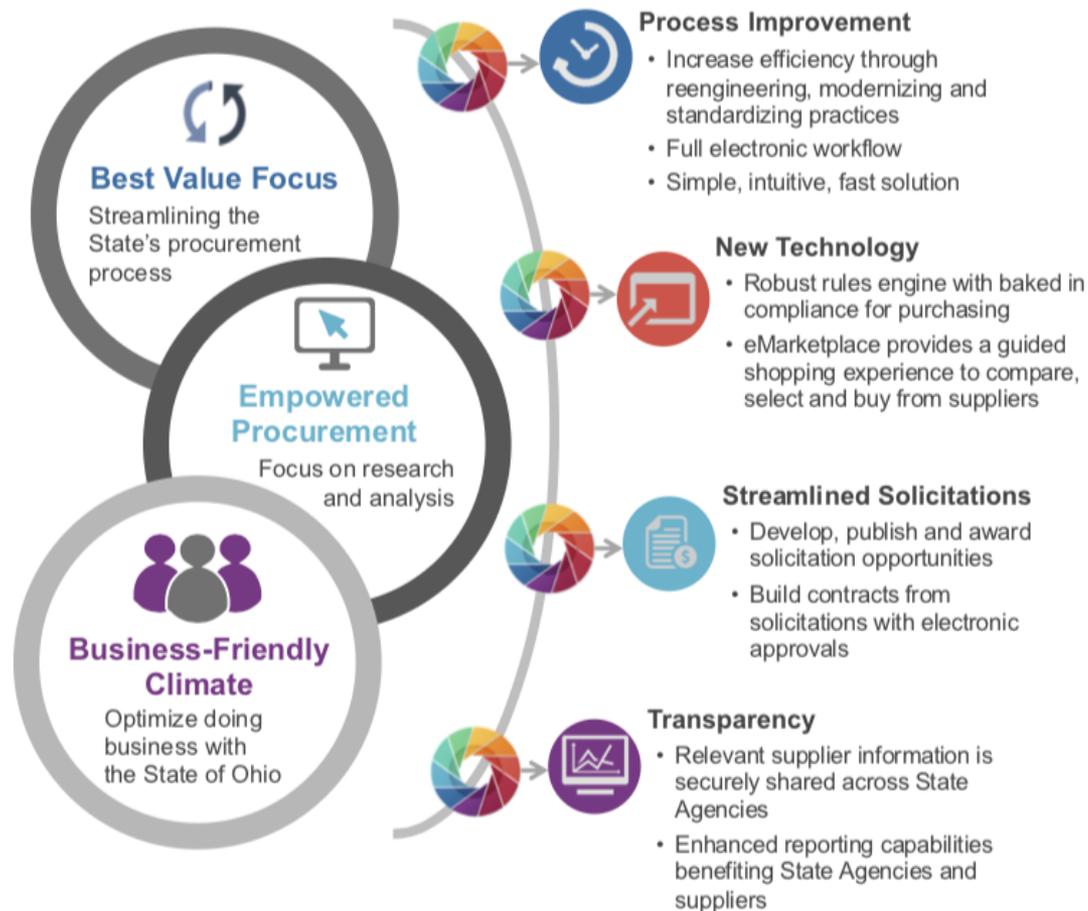
# Questions?



# Ohio | eProcurement

Kelly Sanders, Chief Procurement  
Officer

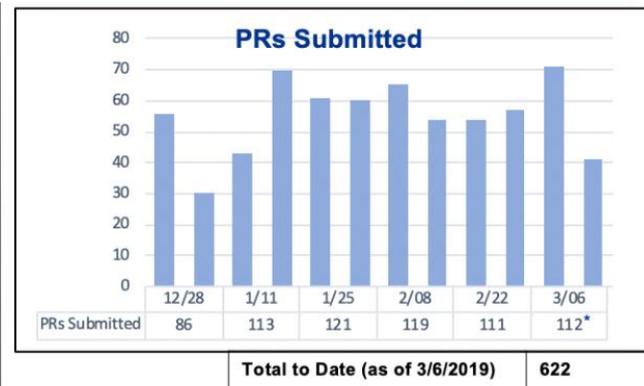
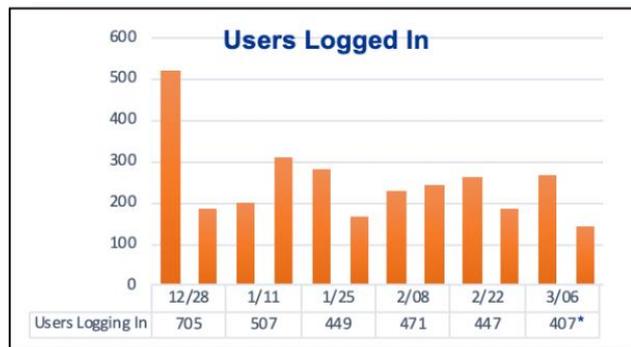
# Ohio | eProcurement



# Ohio | eProcurement

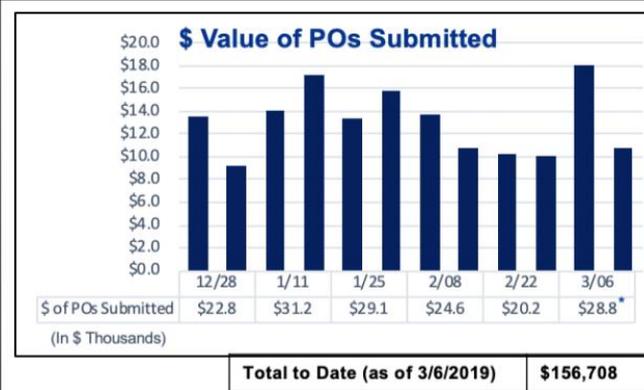
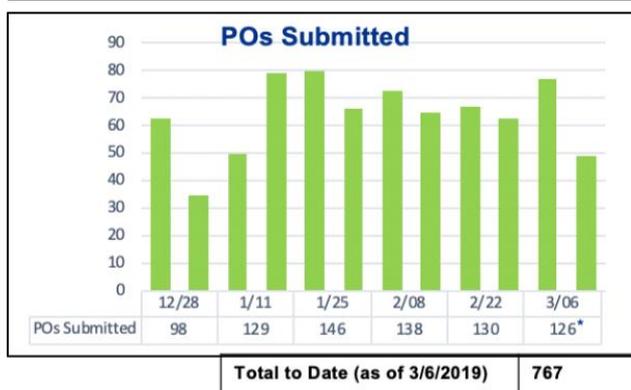
**Go Live  
December  
2018**

1



3

2



4

# Ohio | eProcurement

## Release 1 Feedback

**Ohio** | Department of  
Rehabilitation & Correction

*“Our procurement employees have found the new eProcurement solution easy to navigate and overall improved experience from previous procurement tools.”*



*“The project staff remained focused on project scope delivery, purposefully, thought outside the box to limit customization requests, and pushed themselves creatively to reach decisions within the confines of the solution.”*

**Ohio** | Department of  
Youth Services

*“The new eProcurement solution, with its sleek shopping experience, has the potential to streamline our agencies processes to become a more efficient Procurement partner.”*

**Ohio** | Department of  
Administrative Services

# Ohio | eProcurement

## Additional Testimonials and Recent Successes

*“Design sessions have been intense and very helpful!”*

*“eProcurement makes purchasing simple and easy!”*

*“Access to eProcurement data and usage analytics has been really beneficial!”*

*“I feel informed and ‘in the know’ from Design Session outcome reports.”*

### Issue Resolution Success

Issue resolution and timely remediation is important to the eProcurement team.

Recently, an operational issue in the eProcurement system was reported to the team. The Ohio Shared Services and eProcurement Project Technical Team rallied together to identify the root cause and repair the issue within 3 hours, minimally impacting Procurement business operations.

### Agency Engagement Success

The eProcurement Change Management team has been embedded within the 12 Early Adopter Agencies since Fall 2018.

This team is committed to supporting the unique needs of each agency. Together the team has uncovered and reported process inconsistencies to consider and address during design sessions.

# Ohio | eProcurement

## At a Glance

### Ohio | eProcurement



#### What Order-to-Pay functionality means for you:

- Utilize quick quoting, guided buying and the addition of even more catalogs for shopping (with or without a Pcard).
- Leverage automated workflows to route items for approval, as well as dashboard capabilities to track activity.
- Seamless linkage across order-to-pay transactions; increasing compliance while automating exception scenarios by routing to proper authority.



#### What Solicitation, Contract Management and Data Analytics functionality means for you:

- Create solicitations, award and manage contracts, and measure spend and supplier performance, all in one place.
- Take advantage of data analytics and reporting to track spend across contracts, categories and suppliers. Reporting can be generated both at the agency and enterprise level.

\*Subject to changes during R2 discovery and design

# Ohio | eProcurement

## Release 2 Phases

Phase	Activity	Approx. Dates
<b>Analysis</b>	<ul style="list-style-type: none"><li>Discovery Workshops</li><li>Business Modeling</li><li>Requirements Review</li></ul>	January 2 <sup>nd</sup> through February 15 <sup>th</sup>
<b>Design</b>	<ul style="list-style-type: none"><li>Capture Workshops</li><li>Refine Workshops</li><li>Integration Design</li></ul>	February 5 <sup>th</sup> through April 23 <sup>rd</sup>
<b>Build</b>	<ul style="list-style-type: none"><li>Iterative Builds &amp; Review Workshops</li><li>Configuration Work</li><li>Integration Work</li></ul>	March 25 <sup>th</sup> through June 20 <sup>th</sup>
<b>Testing</b>	<ul style="list-style-type: none"><li>Automation Testing</li><li>System Integration Testing (SIT)</li><li>User Acceptance Testing</li></ul>	April 9 <sup>th</sup> though August 15 <sup>th</sup> (UAT: July 5 <sup>th</sup> though August 9 <sup>th</sup> )
<b>Training</b>	<ul style="list-style-type: none"><li>Deliver Online and In-Class Training</li><li>Report on Participation</li></ul>	August 5 <sup>th</sup> through August 16 <sup>th</sup>
<b>Go-Live</b>	<ul style="list-style-type: none"><li><b>Release 2 and Integrations</b></li></ul>	<b>August 19<sup>th</sup></b>
<b>Hypercare</b>	Support for Users and State Team	August 19 <sup>th</sup> through November 1 <sup>st</sup>

During the Design phase, all major processes are discussed and designed in detail.

We have engaged Early Adopted Agency Leads to help guide design decisions for your agencies and build a quality eProcurement solution that meets the procurements of the State of Ohio.

As of March 5<sup>th</sup>, the Design Team will be approaching the middle of Design phase with Refine Workshops starting.

# Ohio | eProcurement

## Supplier Engagement for Release 2

The communications approach for Release 2 Catalog Suppliers is being finalized, which includes two sets of email communications.



### Catalog Enablement Emails

Ensures suppliers are aware of eProcurement and prepared to set up their catalogs.

1. Kick-off Email from Kelly Sanders
2. Catalog Options and Next Steps
3. Supplier Training



### OAKS Supplier Data Emails

Ask suppliers to review and update their data in OAKS via current form to OSS for updates.

1. Spring Data Clean-Up Launch
2. Reminder & FAQ
3. Confirmation & Future Updates

**We will be targeting approximately 1,555 suppliers tied to GSD Contracts for Release 2**

~1,000 Non-IT | ~200 CRP | ~ 355 IT Contracts

# Ohio | eProcurement

## For More Information

Fact Sheets

Overviews

Demos

Quick

Reference

Guides

FAQs

And more!

The screenshot displays the Ohio Department of Administrative Services website. At the top right, there is a search bar and the text "Ohio.gov | State Agencies | Online Services". The main header includes the "Ohio" logo and "Department of Administrative Services". A navigation bar below the header contains links for "HOME", "FOR BUSINESS/PUBLIC", "FOR STATE AGENCIES", "FOR STATE EMPLOYEES", "DIVISIONS", and "CONTACT US".

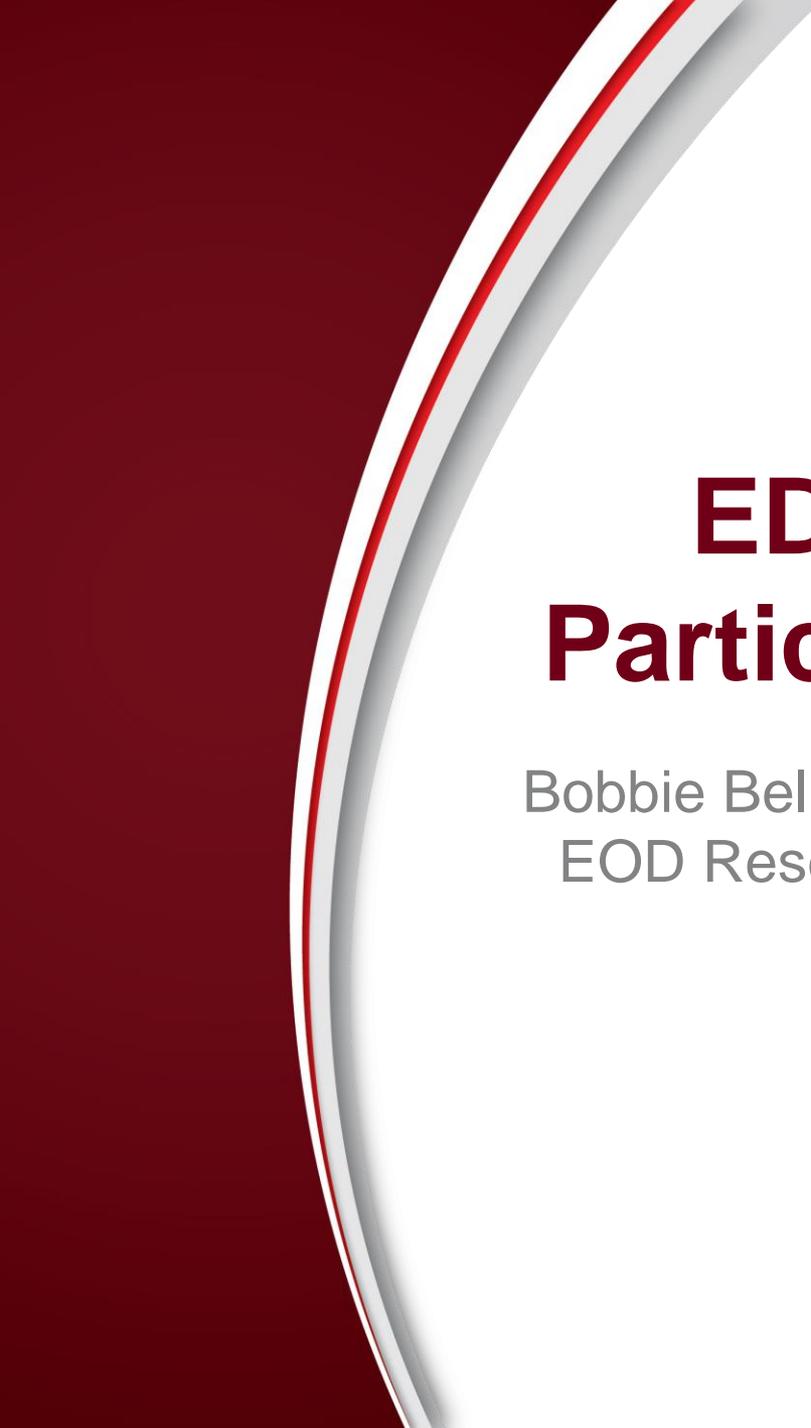
The main content area is titled "ONLINE EXPERIENCE" and features "Ohio | eMarketplace". Below this are three video thumbnails with play buttons:

- Ohio | eProcurement**: *Ohio's eProcurement Journey*
- Ohio | eProcurement**: *General Navigation Demo*
- Ohio | eProcurement**: *Submitting a Pcard Purchase Demo*

On the right side of the page, there are several red-bordered sections:

- GENERAL CONTACT**: 4200 Surfside Road, Columbus, Ohio 43228. Voice: 614.466.5090. Driving directions. Wayne McCully, Deputy Chief Procurement Officer. Wayne.McCully@das.ohio.gov
- SERVICES**: State Procurement, eProcurement, Cooperative Purchasing, Community Rehabilitation Programs, Supplier Registration, Procurement Opportunities, Current Contracts, IT Staff Augmentation, Procurement Compliance Checklist.
- POLICIES**: Procurement Procedures for Supplies, Services and Information Technology, State Term Schedule Guidance.
- PUBLICATIONS**: Help and Reference Materials.
- FORMS**: for Agency Forms, for Supplier Forms.

# Questions?



# **EDGE Graduation and Participation Time Limits**

Bobbie Bell-Bartholomew, Program Administrator,  
EOD Research, Reporting and Recruitment Unit

# Background



The State of Ohio's *Encouraging Diversity, Growth and Equity (EDGE)* program was created to encourage, nurture, and support the growth of economically and socially underutilized businesses, to foster their development, and to increase the number of qualified competitors in the marketplace. Like its federal counterpart, the U.S. Small Business Administration's (SBA) Section 8(a) program, this program provides a base of support over a set period of time that helps these businesses to compete successfully in the marketplace.

# Background

A number of EDGE businesses are reaching the maximum 10-year time limit for program participation or they qualify as program graduates having grown their businesses over time, exceeding the net-worth or business-size threshold limits that had designated them as “economically disadvantaged” as set by the law establishing this program.

As businesses graduate or reach maximum participation time for EDGE, program resources are freed up to assist more disadvantaged businesses.

# 10-Year Time Limit

The maximum amount of time a certified business or business owner may participate in the EDGE program is 10 total years.

- Certification time begins the date a business is first certified.
- Businesses or business owners that reach the total 10-year time limit are *not* eligible to re-enter the program.
- This allows eligible businesses to continue to access resources.

# Graduation

## Economically Disadvantaged Business Owner:

- Personal net worth at initial application must be less than \$250,000 and not exceed \$750,000 during any time of certification.
- If business graduates because of no longer being “economically disadvantaged” but later becomes so again, can re-enter program (for amount of time left within the owner’s 10-year time limit).

# Graduation

## Economically Disadvantaged Business:

- Must be a “small business” while in the program. Size standards represent the largest size that a business (including subsidiaries and affiliates) may be to remain classified as a small business.

## Based on:

- Average of the gross receipts from the last three fiscal years, or
  - Average number of employees during the last three fiscal years.
- In either case, the average amount of gross receipts or number of employees cannot exceed the North American Industry Classification System (NAICS) code size cap (established by the SBA).

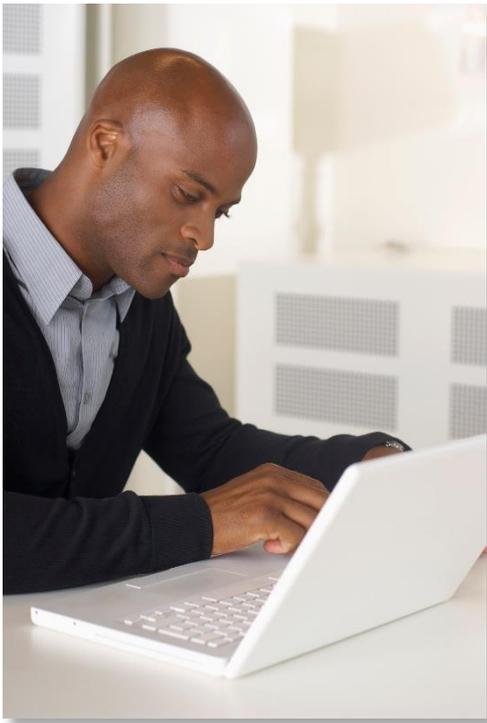


## EDGE Contract Credit

A state agency entering into a contract with an EDGE-certified business *will be granted credit* toward its EDGE goal for the EDGE business's performance on the contract should the business graduate from the program or be term-limited during the term of the contract.

**Should you get  
inquiries from  
businesses:**

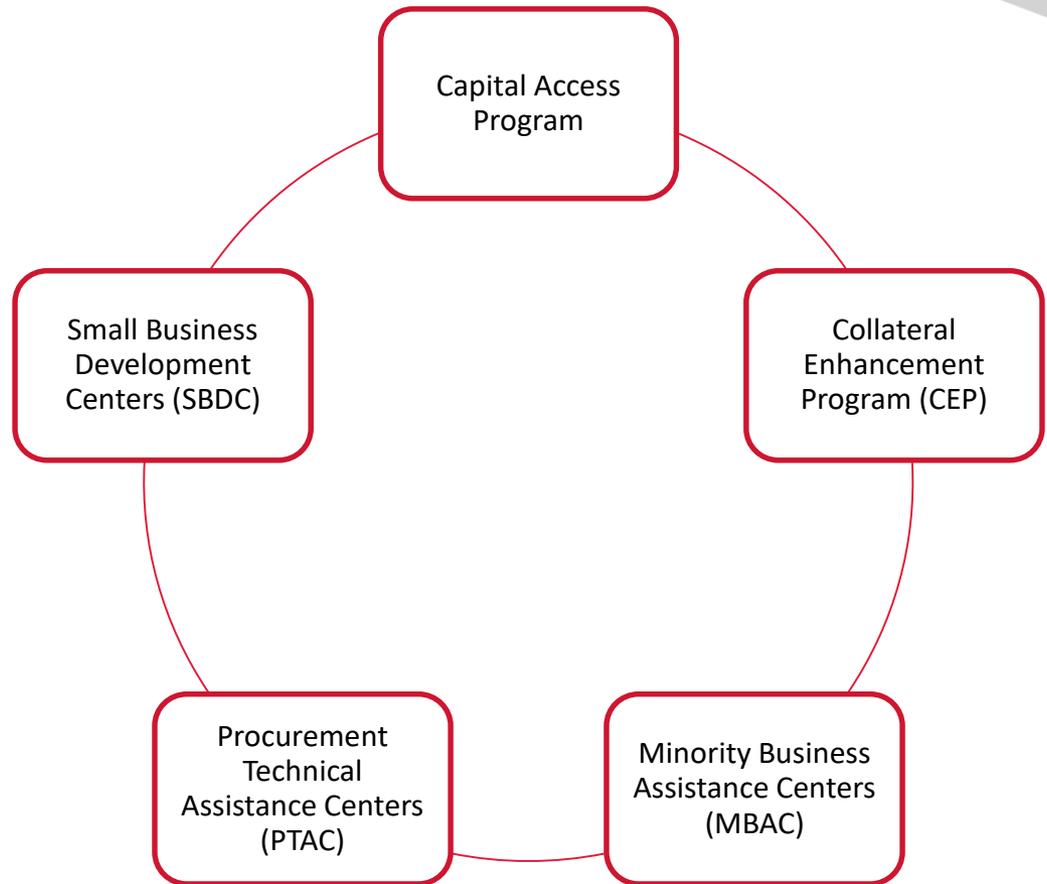
# Minority Business Enterprise (MBE) Certification



For those businesses who are dual certified into both the EDGE and MBE programs, this policy has **no** impact on their MBE certifications.

# Resources

Once a business graduates or is time-limited, the business could continue to be eligible for one or more of the following programs offered through the Ohio Development Services Agency.



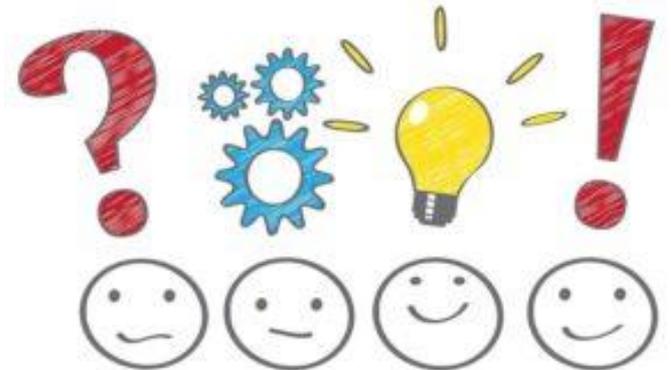
# Questions

Contact us with questions, comments or concerns:

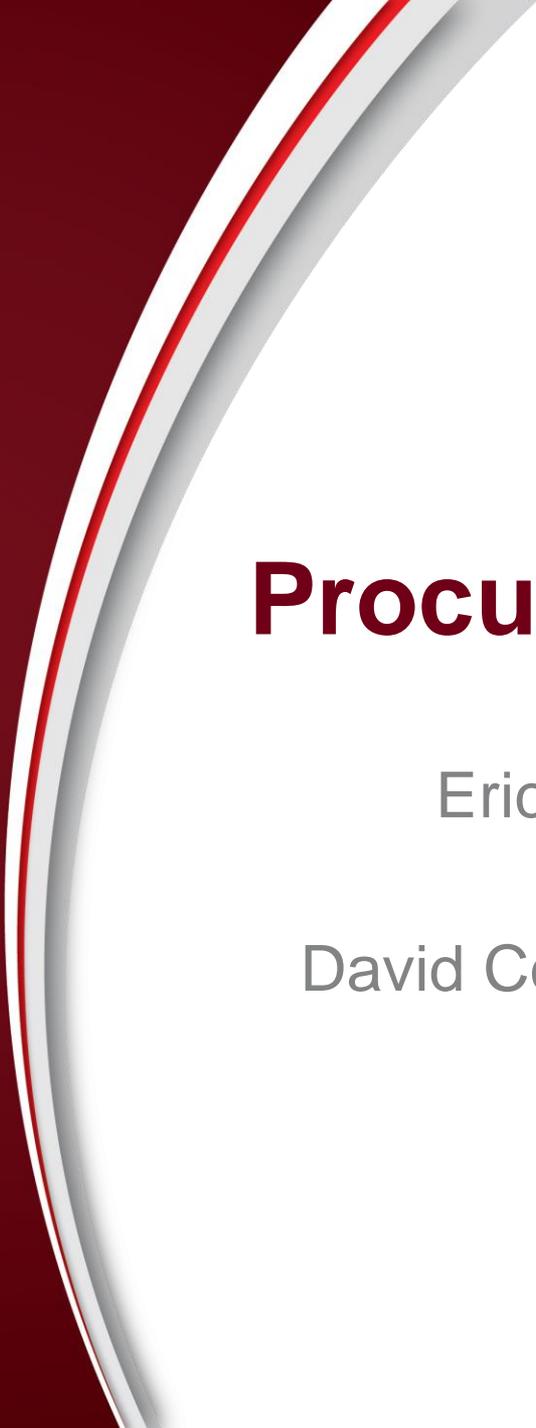
- Email: [das-eod.research@das.ohio.gov](mailto:das-eod.research@das.ohio.gov)
- Main: 614-466-8380
- Direct: 614-752-9271

Online:

- Division: [das.ohio.gov/eod](http://das.ohio.gov/eod)
- Research, Reporting and Recruitment: [das.ohio.gov/eod/rrr](http://das.ohio.gov/eod/rrr)
- *Reconciliation Meetings: Coming March 2019*



**Thank you.**



# Procurement Team Updates

Eric Glenn, Deputy Chief Procurement  
Officer

David Colopy, Transportation and Business  
Services Team Manager

# Procurement Team Updates

- Knowledge Services
  - Invoice Processing
  - FY 20 Resource Renewals
- Agency Specific Contract Renewals
- Enterprise PC Purchases
- Enterprise Contracts Expiring June 30, 2019

# Procurement Team Updates

- Vehicle Contracts
  - GDC104 – RS902319 (Autos)
  - GDC093 – RS902619 (Trucks)
  - No initial award and will be rebid
    - Full-size SUV
    - 12,800 lb. 2WD extended cab

# Questions?



# What's on Your Mind?

Agency Procurement Officers

# NEXT MEETING

**Date:** Wednesday, June 12, 2019

**Time:** 1:00 PM – 4:00 PM

**Location:** Walnut - Willow Conference Room ●  
4200 Surface Road

**WebEx:** Link will be forwarded prior to meeting