
Spring 2018 APO Meeting Agenda

Date: Monday, May 14, 2018
Time: 1:00 p.m. – 4:00 p.m. • Registration opens at 12:30 pm
Location: Walnut - Willow Conference Room • 4200 Surface Road

Welcome & Introduction of New Team Members	Kelly Sanders
OPS Organization Update	
EDGE Graduation	Pamela Osborne
Insurance Requirements in Contracts	Randy Dublikar Traci Heyer
Strategic IT Budgeting	Betsy Bayshore
NextGen eProcurement Update	Kelly Sanders
IT Procurement Updates	Eric Glenn
<ul style="list-style-type: none">• Enterprise PC Aggregated ITB• Data Analytics• Sales Force	
Non-IT Procurement Updates	Todd Gable Kellie Johnson
<ul style="list-style-type: none">• GDC072 – Electric Aggregation Award• GDC028 – Elevator Preventative Maintenance• GDC160 – IAP Contract• Independent Medical Exams• Gift Card Program• 510051 Account Code Changes	
Training Academy Initiatives	James Yagodich
Posting Solicitations on Procure.ohio.gov	Gayle McDargh
State Administrative Policies	Andrew Cochran
<ul style="list-style-type: none">• PM-01 – Purchasing Procedures• PM-02 – Emergency Purchasing Procedures	
Amazon Business Procurement Manual	Steve Meese
Open Discussion	All

**SUMMER 2018
APO MEETING**

Date: Wednesday, August 29, 2018
Time: 1:00 PM – 4:00 PM • Registration opens at 12:30
Location: Walnut - Willow Conference Room • 4200 Surface Road

The State of Ohio is an equal opportunity employer.



Agency Procurement Officers Meeting



A+ - Agile

- S** - Streamlined
- E** - Effective
- R** - Responsive
- V** - Value-based
- I** - Innovative
- C** - Customer-focused
- E** - Ethical

May 14, 2018



OhioDAS

SERVICE · SUPPORT · SOLUTIONS
DEPARTMENT OF ADMINISTRATIVE SERVICES

Office of Procurement Services Updates
Kelly Sanders, Interim GSD Deputy Director
Chief Procurement Officer



Office of Procurement Services

Team Updates:

Maintenance, Repair, Operations, Security Team

- *Melissa Anderson, Procurement Analyst*
- *Adam Williamson, Procurement Analyst*

Transportation, Business Services Team

- *Roger Holifield, Procurement Analyst*
- *Brad Ratliff, Standards Analyst*
- *Erica Mavis Procurement Analyst*

Food, Clothing, Office Team

- *Mackenzie LaRue, Standards Analyst*
- *Nicole Marisa, Standards Analyst*
- *Mike Eshelman, Procurement Analyst*



Office of Procurement Services

Team Updates:

Enterprise IT Contracting

- *Best wishes to Rose Perkins who has taken a position with another state agency*

Recently Retired

- *Pam Storts, Enterprise IT Contracting*
- *Maria Johnson, Enterprise IT Contracting*
- *Alan Childress, Non-IT Procurement Contracting*

Medical, Lab Goods & Services Team

- *Wishes CAROL CLINGMAN all the best in her retirement after serving the State of Ohio for 24 years!*



OPS Organization Update

- Centralized enterprise procurement function
- OPS is now made up of these teams:
 - IT Procurement
 - Non-IT Procurement
 - Operations



Our Goals

- Establish a single point of accountability
- Enhance coordination and communication
- Support a customer-centric approach
- Establish a robust data analytics capability across central procurement



Next Steps

- Review and integrate current policies, procedures, processes, tools and templates for opportunities
- Evaluate budgets and funding structures
- Single procurement fee in FY19
- Physical move of IT Procurement to Surface Road in FY 19



Questions?





EDGE Graduation and Participation Time Limits
Pamela Osborne, Acting Deputy Director



EDGE Graduation and Participation Time Limits

10-Year Time Limit Graduation

- Economically Disadvantaged Business Owner
- Economically Disadvantaged Business



Questions?





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DEPARTMENT OF ADMINISTRATIVE SERVICES

Insurance Requirements in Contracts
Traci Heyer, Risk Manager – Underwriting/Analytics



Risk Management Reviews

Why?

- Recommendations are provided as a service
- Protect the State against loss due to a vendor's negligent acts, errors or omissions
- The State is uninsured for most losses
 - Agencies that don't participate in enterprise insurance programs
 - Commercial insurance deductibles



Examples of Losses

- Roofing contractor doing hot work causes a fire that burns the entire building to the ground. The loss to state property exceeds \$17m
- Claimant suffers a seizure and cardiac arrest. The family asserts a claim that the contracted security personnel failed to follow code blue emergency protocol, which resulted in death
- Vendor performing repairs on a generator back feeds the current, causing irreparable damage



Risk Assessment Form

- Created to assist procurement and agency in identifying unique/high risk exposures
 - Streamlines process
 - Reduces emails from Risk Management
- Reviews can be documented and tracked in our system
 - Consistency for contracts with similar exposures
 - Ability to refer back to notes pertaining to analysis, research and consultation with the State's broker
 - Ability to generate reports to APO, if desired



Questions?



FY 20-21 Operating Budget
*Strategic IT Budget and
Major Project Funding Requests*

APO Meeting May 14, 2018

Betsy Bashore



OBM

WIIFM

- Improved alignment between enterprise IT, budget, and procurement
- Reduced “surprise”
- Increased lead time and support



Strategic IT Budget (Part I)

- Three-year rolling budget (budget biennium + 1 year forecast)
 - On-going planning and management practice to better reflect and predict
 - Lifecycle and funding needs
 - Prioritization and funding source
 - Evolution of budgeting and finance to reflect IT trends
 - Supports planning and improves success rate
 - Increases visibility into procurement and contract management
 - Supports funding and related investment returns



Why IT-specific budgeting?

- Technology evolution
 - From mainframe to SaaS and Cloud
 - Related updates to Accounting Standards to clarify funding sources
 - Feasibility of debt funding for certain types of projects diminishes
 - Shift from CapEx (↓ 40%) to OpEx (↑ 10%)
- Tax receipts trend and business cycle forecast
 - Higher interest rates increasing the cost of borrowing
 - State aggregate IT spending growth above industry averages



Major Project Funding Request (Part II)

- A Major Project is:
 - Total expenditures over the project lifecycle are estimated at over \$5 million.
 - Total expenditures over the project lifecycle are estimated at over \$2.5 million and the project is categorized as “high-risk”. A high-risk project may include:
 - A major technology project or business project/business transformation involving significant technology investment.
 - The project is determined to be high risk (new or emerging technology, sensitive subject area) or high impact (affecting many constituents or stakeholders, creating profound change).
 - The project has an enterprise or statewide impact; involves more than one state agency, board or commission; or is initiated by a state agency and will involve other non-state governmental entities/organizations.
 - The project develops, adds functionality, or re-engineers a mission critical business process and/or application.



Major Project Funding Request – Components and Timing

- *Business Plan and Project Financial Plan* workbook
 - For each proposed or new project
 - For projects started within the past two years (FY 2018 or 2019) that are underway and requesting additional funding
 - For multi-year phased projects that may also be requesting additional funding.
- Agencies must complete both the narrative *Business Plan* as well as the *Project Financial Plan* workbook



Major Project Funding Request – Components and Timing (cont.)

- Required for new projects introduced during the budget cycle
- *Can be submitted* at any time prior to the budget cycle
- Due no later than the date of the budget request submission for the first year in which funding is requested.
- Updated at least annually and updates submitted by April 1.



Business Plan - Elements

1. General Information

Agency, name of project, sponsor, PM

2. Type of Technology Project

3. Purpose of Technology Project

4. Project Information (overview)

5. Goals and Outcomes/Benefits

6. Estimated Start and End Dates - Qtr and Yr

7. Risks



Business Plan – Elements (cont)

8. Financial Plan—Project Expenditure Summary

9. Financial Plan—Cash Flow Projection

10. Cost Estimate Methodology

Assumes completion of market research

11. Non-financial Resource Estimates

12. Operations Plan

13. Management Team



Business Plan – Elements (cont)

Additional questions for services that are rated or charged back to operating units

14. Industry and Customer Analysis

15. Competitive Analysis



Project Financial Plan

- Breakout of the project budget by phase
- Breakout of project and future run by cash flow based on the *Business Plan*.



Additional Pre-RFP resources

- Market Research practices and checklists
- Analysis of Alternatives Guidance
- Requirements – 10 Best Practices
- Writing Clear and Effective Statements of Work
- **Acquisition Plan**



Tools and Templates

www.OBM.Ohio.gov/VMO

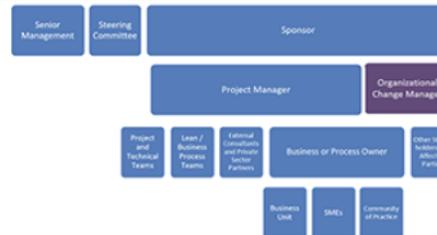
- Value Management Home
- Value Management Framework
- Resources and Templates**
- Organizational Change Management Tools
- Value Reporting
- About
- Contact Us



VALUE MANAGEMENT OFFICE

Resources and Templates

Key Participants and Relationships



Overview

- [Project Management Glossary](#)
- [Value Management Framework 2017](#)
- [Read More...](#)

Concept

- 1 The Role of the Sponsor (New)
- 2 Sponsor Checklist CONCEPT
- 3 Phase 0 CONCEPT General Guidance
- 4 Business Case Template
4. Business Plan Template
- 5 Project Classification Assessment Toolkit
- 7 Summary Lessons Learned (updated 12-19-17)
- 8 Project Update Snapshot
9. Market Research and Alternatives Analysis Tips (NEW)

[Read More...](#)



Framework and Starter Tasks

www.OBM.Ohio.gov/VMO

- Value Management Home
- Value Management Framework
- Resources and Templates
- Organizational Change Management Tools
- Value Reporting
- About
- Contact Us



VALUE MANAGEMENT OFFICE

Value Management

Why use this site?

When you apply the Value Management Framework, you're showing you want to:

- Increase the likelihood of project success and
- Reduce the risk of project failure

This site will help you do both.

What will I find here?

Want to meet the expectations that come along with major project investments? Learn why the Value Management Framework is important and how to apply it to your project.

Take the guesswork out of managing large projects and use our resources and templates to keep your project on track.

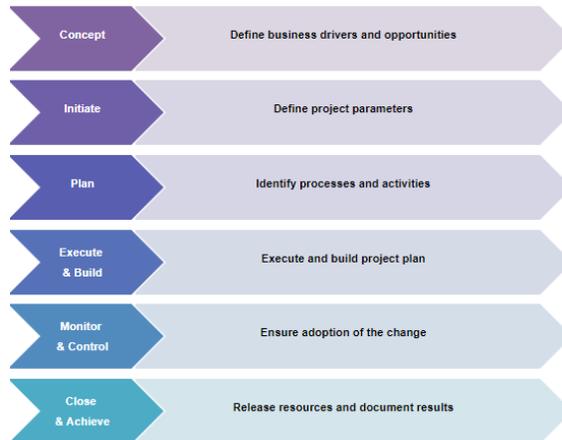
Use the Organizational Change Management Tools to prepare for, manage, and reinforce the changes that come along with your project.

You can also meet your reporting obligations at the Value Reporting Portal.

Resources and Templates

Value Management Framework

The Value Management Framework helps project managers and sponsors achieve desired project results.



INITIATE Steps:

1. Review the Sponsor Checklist INITIATE.
2. Review the Phase 1 INITIATE General Guidance to ensure familiarity with the process.
3. Develop the Sponsor Roadmap. Also complete the Sponsor Agreement and the Sponsor Action Plan.
[Read More...](#)
4. Form a steering committee. Review the Steering Committee Purpose and Role and Steering Committee Basics, and complete the Steering Committee Reference template.
[Read More...](#)
5. Discuss the vision statement with the steering committee to ensure broad acceptance of the project vision. Also discuss the Business Case.
[Read More...](#)
6. Complete the Project Charter template.
[Read More...](#)
7. Create the RACI matrix and the OCM RACI (called the ARCI).
[Read More...](#)
8. Complete the risk analysis in the Risk Issue Action Decision Tracker toolkit and the OCM Impact Gathering tool.
[Read More...](#)
9. Document known dependencies, constraints and assumptions.
[Read More...](#)
10. Discuss and review Tracking Decision Latency guidance.
[Read More...](#)
11. Conduct a Stakeholder Analysis and document stakeholders in the Stakeholder Register.
[Read More...](#)
12. Complete the OCM Strategy outline and formalize the OCM Work Plan.
[Read More...](#)
13. Draft the initial Project Plan, starting with creating (or updating) a work breakdown structure (WBS).
[Read More...](#)



OBM

Contact Us

- Value Management Office
 - ValueManagement@ohio.gov
 - Betsy Bashore
 - Betsy.Bashore@obm.ohio.gov
 - 419-350-6354
 - Troy Gazette
 - Troy.gazette@obm.ohio.gov
 - 614-558-5201





NextGen eProcurement Update
Kelly Sanders, Interim Deputy Director, Chief
Procurement Officer

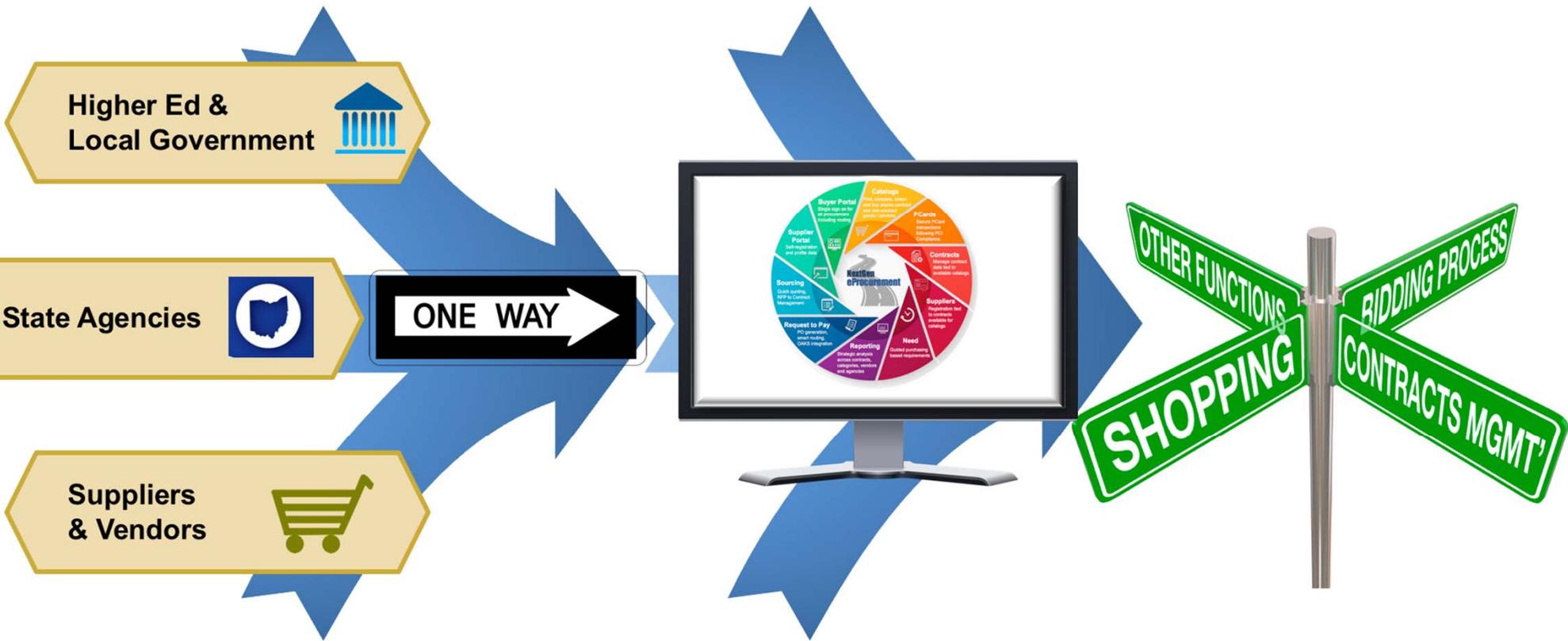


Topics

- NextGen eProcurement
- Project Team
- Project Status & Update
- Project Approach
- Initial Launch
- Project Timeline
- Fact Sheets & Email
- Informed & Involved
- Q & A



NextGen eProcurement





Project Team

Eric Glenn & Sandy Herrel
*State Procurement
Business Owners*

Coming Soon
State eProcurement Project Manager

Steve Meese
State Procurement Practice Lead

Velissa Davis
State eProcurement Business SME

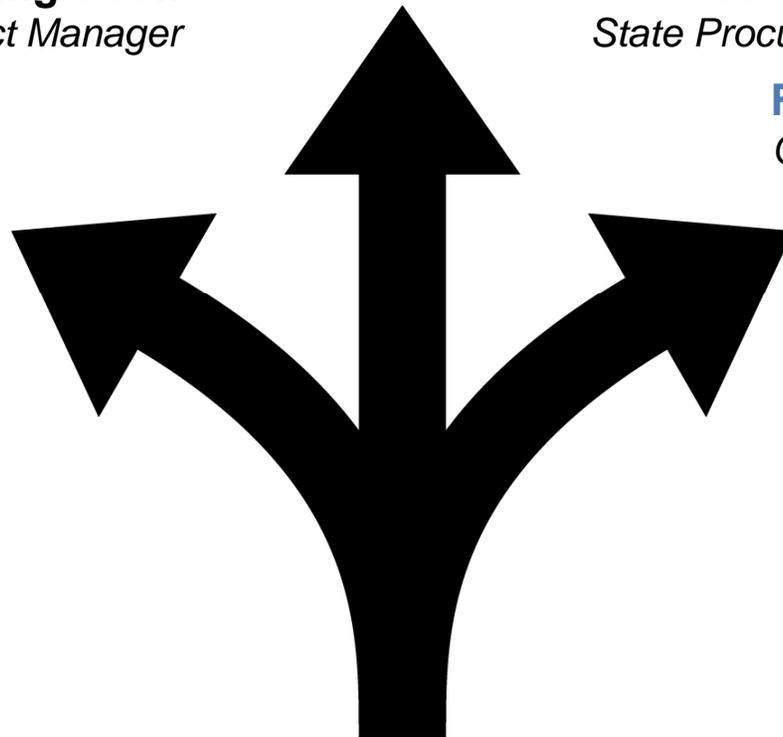
Remard Colston
OAKS Project Lead

Karrie Converse-Jones
*State Organizational Change
Management Project Lead*

Kellie Johnson
*Project Business Analyst
(Central Procurement)*

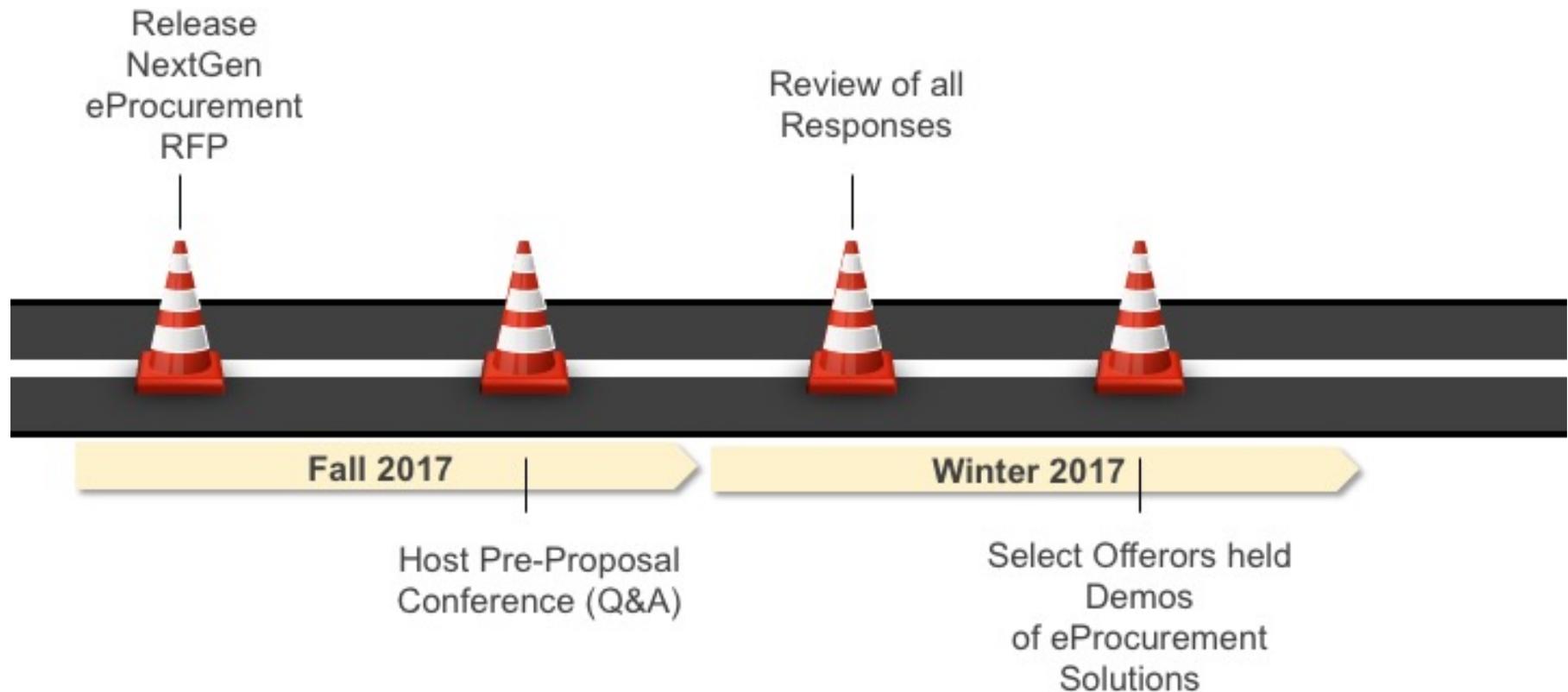
Coming Soon
*OPS eProcurement
Manager*

Kelli Whalen
*Project Business Analyst
(Agency Procurement)*





Project Status





Project Status Update





Project Approach

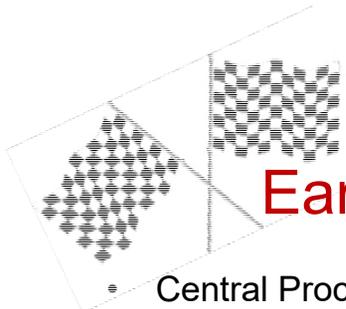
Goals

- Best Value Focus
- Empowered Procurement
- Business-Friendly Climate
- Increased Effectiveness





Initial Launch



Early Adopters

- Central Procurement
- DAS / OBM Procurement
- DAS / OBM Finance
- DAS / OBM PCard Holders

Early Adopter agencies:

- BWC, COM, DOH
- INS, LOT, DMAS
- DPS, DRC, DYS, DOT



Open Marketplace 2018



Project Timeline

Initial Launch



2018
Central Procurement
DAS / OBM
Early Adopters

Full Functionality



2019-2020
Users / PCard Holders
in remaining State
Cabinet Agencies
Financial Suppliers
Procurement Suppliers

Full Deployment



2020-2021
Total Remaining Users
in 24 State Cabinet
Agencies
Higher Education
Local Governments



December 2018

June 2020

June 2021



Fact Sheets & Email

Ohio **DAS**
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DEPARTMENT OF ADMINISTRATIVE SERVICES

NextGen eProcurement

For State Agencies, Boards and Commissions

What is NextGen eProcurement?
NextGen eProcurement will fundamentally change how the State of Ohio purchases goods and services by transforming procurement processes, policies and contracts through the implementation of an innovative, proven and secure cloud-based solution.



NextGen eProcurement Benefits

- Buyer Portal**
Use Your State of Ohio User ID for single sign-on to perform all procurement actions and smart routing to the appropriate action.
- Supplier Self-Registration**
Single source for supplier profile data, integrated across all modules of the system. Current information when and where you need it.
- Robust Rules Engine**
Navigate procurement processes with baked-in compliance that reflects state and agency-specific policies, workflows and approvals.
- Open Marketplace Shopping**
One stop to find, compare, select and buy across requisites, contracts and internet market sources.

- Quick Quote**
Simplified bidding process that automates, standardizes and expands competition replacing three-quote practices.
- Solicitation Management**
Develop, publish, evaluate and award standard and personalized templates. Fully integrated with Supplier accounts for bid notifications and online bidding.
- Contract Management**
Build from solicitations or stand-alone, manage all aspects including documents, event notifications, amendments and renewals.
- Data Analytics/Reporting**
Strategic analysis into purchases across contracts, categories, vendors and organizations, which can be configured to fit individual needs.

Continued on back

NextGen eProcurement

For State Agencies, Boards and Commissions

Target Functionality

- Open Marketplace**
Shop from state contracts using online catalogs, supplier punch outs and other internet shopping sites.
- Quick Quoting**
Send suppliers informal quote requests and receive responses online.
- Online Sourcing and Bid Management**
Automated formal solicitation development, notifications and web postings.
- Contract Management**
Automated functions to create contracts, send notifications, track contract and supplier performance and publish documents online.
- Electronic Ordering**
Send supplier orders electronically (e.g., cXML, EDI, email or e-fax).
- Ability to Use Payment Cards**
Secure use of P-Cards to pay for orders in a Payment Card Industry (PCI) compliant process.
- Spend Analytics and Reporting**
Comprehensive data analytics with insight into processes, trends, compliance and spend for strategic sourcing. Users can create reports using dashboards, charting, drill-downs and more.
- Smart Workflow Routing**
Role-specific workflow routing and approval with delegation, audit and reporting capabilities.

What is NextGen eProcurement?

- PAST**
 - Transactional inefficiency
 - Higher cost of doing business
 - Challenging user experience
- PROJECT**
 - Collaborating with agencies and state entities
 - Building technology partnerships
 - Learning from other states and associations
- FUTURE**
 - Best value focus
 - Empowered procurement
 - Business-friendly climate
 - Increased effectiveness

GOVERNMENT RANKINGS of Ohio #5 RANK JOIN US ON THE JOURNEY

We can answer your questions and support Procurement in your Agency!

Contact us:

eprocurement@das.ohio.gov



Informed & Involved



- **Early Adopter Agencies**

- Individual engagement approach April - June
- Weekly Project Status Updates starting in July

- **Remaining Agencies**

- Biweekly updates starting in July
- Procurement website updates
- APO messages



Questions?





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IT Procurement Updates
Eric Glenn, Deputy CPO



IT Procurement Updates

- Enterprise PC Aggregated ITB
- Data Analytics
- Sales Force



Questions?





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DEPARTMENT OF ADMINISTRATIVE SERVICES

Non-IT Procurement Updates

Todd Gable – State Procurement Manager
Kellie Johnson – State Procurement Manager



GDC072 Electric Aggregation

- Awarded supplier: Pro Star
- Optional use
- Services offered
- Benefits



GDC028 Elevator Preventative Maintenance

- Awarded suppliers
 - Schindler – Northeast and Northwest
 - Oracle – Central, Southeast, Southwest
- Services offered
- Pricing structures



GDC160 IAP Contract

- Third Party Administered Facility Maintenance and Repair
- Professional Design and Engineering
- Requisite Review Process
 - Requisite Review Agencies
 - Submitting an RTP



Medical and Lab Goods and Services

- Independent Medical Exams
- Gift Card Program
- 510051 Account Code Changes



Questions?





Training Academy Initiatives
James Yagodich, Training Academy Manager



OAKS Financials Training Updates

- Updating training materials
- Discussing P.U.M. training methodologies
- New email communication
 - OAKS FIN Communications@das.ohio.gov



Fiscal Year End Prep

- Security role access
- PO Clean-Up reports
- Instructor-led classes are available



OSS Contact Center
614-338-4781
OhioSharedServices@ohio.gov





Posting Solicitations on Procure.Ohio.Gov
Gayle McDargh, COPM, Procurement Manager



Posting Opportunities

In 2009 Executive Order 2008-12S was issued requiring State Agencies that purchase supplies or services exceeding \$25,000 to post all opportunities on the State Procurement central web portal. The posting of contract awards was codified into law under **ORC 125.112**.

To post opportunities and update contract information, State Agencies can request a login name and password at:

<https://www.procure.ohio.gov/proc/RequestAgencyUserAccount.asp>.

Questions regarding the Procurement web portal should be directed to the Procurement Support team at 1-614-466-5090.



Posting Opportunities

Gain access to the back office.

A screenshot of the Ohio.gov website navigation menu. The top bar contains 'Ohio.gov', 'Procurement Offices', 'State Agencies', and 'Online Services'. Below this is a banner for '2016 STATE PROCUREMENT RANKINGS' with 'State of Ohio #5 RANK'. A secondary navigation bar includes 'Political Subdivisions', 'for the Public', 'News', 'Help & Reference', 'Contacts', and 'LOGIN', with 'LOGIN' circled in red. Below the navigation is a 'You Are Invited!' banner with the text 'Save the Date' and a 'Quick Links' section with 'Current Contract Search' and 'Bid Opportunities Search'.

A screenshot of the 'State Procurement User Login' page. The page title is 'State Procurement User Login'. The text reads: 'This page provides state agencies access to post bid opportunities and contracts. Only state agencies can utilize this login page.' Below this, it states: 'To post opportunities and contracts a User Login ID and Password is required. If you have not yet registered and received a Login and Password please select the "New user? Sign Up..." below.' There are input fields for 'Login Name' (containing 'jncdargh') and 'Password'. There are 'Submit' and 'Forgot Password' buttons. The link 'New user? Sign up...' is circled in red.



Posting Opportunities (continued)

Document Inquiries:

Unclaimed Document Inquiries [New](#)

Procurement Opportunity Inquiry Menu

List my Unanswered Inquiries [New](#)

List all Questions and Answers (by Document)

Search All Inquiries and Answers

List my Contracts

Procurement Opportunity Menu:

[Enter New Procurement Opportunity](#)

Search/Edit Procurement Opportunity

Quality Check Procurement Opportunities

Search/Edit Contracts and Awards

Enter New STS Contract

Enter New MMA Contract

Edit Contracts and Awards

Edit Master Alphabet/Keywords

File Conversion

Mailing Menu:

Subscribe or Unsubscribe to Email List

[Quality Check Procurement Opportunities](#)

Maintenance Menu

Codes Menu

Change my Password (Last Changed 35 days ago)

Log out

Procurement Opportunity

Document:	OT905218	Issued By:	DAS/GSD
Title:	Plastic Bags for License Plates		
Index:	DPS034	Type:	ITB
		Status:	Active
		Market:	MBE
Description	<p>***MINORITY SET-ASIDE BID IN ACCORDANCE WITH ORC CH125.081***
</p> <p><p> Non-mandatory bid conference on May 16th. See ITB for more detail.
</p></p> <p>
</p> <p>Purchase of transparent plastic bags for packaging the 2018 and beyond license plates at the OPI, Lebanon, Ohio license plate production plant.</p>		
Analyst Assigned:	Mayle, Jared		
Requested By:	Administrative Services, Department of		
PDF File:	Choose File No file chosen View pdf Alerts Contact/Information		
	Note:Please upload .pdf files only. Maximum size for uploading file is 2MB.		
URL Link			
Dates:	Posted: 05/03/2018 <input type="text"/>	Opening Date: 05/30/2018 <input type="text"/>	Est. Award Date: <input type="text"/>
Q & A:	Start Receiving On: 05/03/2018 <input type="text"/> Reject After: 05/23/2018 8:00: <input type="text"/>		
Website:	A Zero(0) below indicates the opportunity will be displayed 120 days after Opening(By Default) You may override the default by entering a specific number of days, if needed. Days Displayed After Opening Date: 180 <input type="text"/> Stop Display Date: Display To Web <input checked="" type="checkbox"/>		
	Add Opportunity Category Add Opportunity Addenda		
	View Public Details Page List Actions		

[Save](#) [Reset](#) [Main Menu](#)



Posting Opportunities (continued)

Document:

Title:

List: Tier 1 / or a separate List of

Keywords

1 [Delete](#)

1 [Delete](#)

[Return to Menu](#)

[Edit Procurement Opportunity](#)

Alpha List Items and Keywords for:

Title:

Keywords

K1 [Delete](#)

K2 [Delete](#)

K3 [Delete](#)

K4 [Delete](#)

[Return to Menu](#)

[Edit Procurement Opportunity](#)



Posting Opportunities (continued)

Procurement Opportunity

Document:	OT905118	Issued By:	DAS/GSD
Title:	COATED ALUMINUM FOR LICENSE PLATES		
Index:	DPS009	Type:	ITB
		Status:	Under Evaluation
		Market:	Open
Description	COATED ALUMINUM FOR LICENSE PLATES		
Analyst Assigned:	Nichols, Krista		
Requested By:	Administrative Services, Department of		
PDF File:	Choose File No file chosen View pdf Alerts Contact/Information		
	Note:Please upload .pdf files only. Maximum size for uploading file is 2MB.		
URL Link			
Dates:	Posted: 03/23/2018	Opening Date: 04/09/2018	Est. Award Date:
Q & A:	Start Receiving On: 03/23/2018	Reject After: 04/02/2018 8:00	
Website:	A Zero(0) below indicates the opportunity will be displayed 120 days after Opening(By Default) You may override the default by entering a specific number of days, if needed. Days Displayed After Opening Date: 120 Stop Display Date: Display To Web <input checked="" type="checkbox"/>		
	Add Opportunity Category Add Opportunity Addenda		
	View Public Details Page Replies List Actions		

[Save](#) [Reset](#) [Main Menu](#)



Posting Opportunities (continued)

Responding to Inquiries

Unanswered Questions Pending: [Continue to Menu page](#)

Document	Date Received	Inq#	Log#	Q#	Question	Analyst	Action
EDU D2015 10420	11/4/2016 1:38:14 PM	40147	5	1	Hello, Regarding this procurement, how many firms do you expect to hire, and how many reviews would each firm conduct? Are the reviews day-long? Multi-day? How many reviews and reports does one reviewer conduct in a given week? Finally, what is the budget allocation per review? Thanks, Renee	TAYLORL	Answer
EDU D2015 10420	11/15/2016 6:34:37 AM	40179	11	1	What is the estimated number of reviews? Will the reviews be scheduled by county? What is the length of the term?	TAYLORL	Answer
EDU D2015 10420	11/15/2016 6:34:58 AM	40180	12	1	What is the estimated number of reviews? Will the reviews be scheduled by county? What is the length of the term?	TAYLORL	Answer
DIETITIAN	11/21/2016 5:45:20 PM	40208	1	1	1) Who are the incumbent vendor(s) currently providing these services, if a incumbent vendor(s) currently providing these services? 3) What was the anticipated date of award? 5) What is the anticipated (or preferred) start date? How many hours per day, per week, per month and annually are anticipated agency as the contractor who provides the resume of our dietitian staff?		
DIETITIAN	11/26/2016 8:53:12 AM	40213	2	1	I was inquiring if there is a specific contract period for completing the Dietitian is an established starting and completion date. Thank you. Adrienne Durrett		

Inquiry #40225 for Document:
EDU170627 Brown Bag Facilitators [Return to Menu](#)

Log#	2	Question	1
Submitted By	Jill Proudfoot	eMail:	jillsproudfoot@gmail.com
Company	Jill Proudfoot	Phone:	4197990892
Received:	12/1/2016 10:39:24 AM	Opp Analyst:	Taylor,Luke
Date Responded:		Answered By:	Taylor,Luke

Question:

* Request for Proposal Form: On page 8 it looks like ODE is supposed to fill-in an hourly rate for the brown bag facilitator. It states we are to fill out a "cost summary form" but we are not able to find the form in the documents that were provided. Also, should we put an hourly rate or the \$1500 of one lump sum? • Ohio Secretary of State Registration – needs to be filled out but we cannot find a form for this, can you direct us to the right location? • Online Completion of Affirmative Action Plan needs to be filled out but not sure what form to fill out online. When we look for the online form the website identifies that it is not working at this time. * Is the proposal still due on December 5th or did that change? Thank you! "

Answer:

Display Answer on Web: [Search Previous Q and A](#)

- [Back to previous page](#)
- [View all Questions for this Document](#)
- [Return to List of Unanswered Questions](#)
- [Return to Menu](#)



Posting Opportunities (continued)

The screenshot shows a web browser window with the URL <https://procure.ohio.gov/admin/ProcOpportunity.asp?docNumber=01905118>. The page title is "State Procurement" and the main heading is "Procurement Opportunity".

Document:	OT905118	Issued By:	DAS/GSD
Title:	COATED ALUMINUM FOR LICENSE PLATES		
Index:	DPS009	Type:	ITB
Status:	Under Evaluation		
Market:	Open		
Description:	COATED ALUMINUM FOR LICENSE PLATES		
Analyst Assigned:	Nichols, Krista		
Requested By:	Administrative Services, Department of		
PDF File:	Choose File No file chosen View pdf Add Under Evaluation Cancellation		
URL Link:	Note: Please upload .pdf files only. Maximum size for uploading file is 2MB.		
Dates:	Posted: 03/23/2018	Opening Date: 04/09/2018	Est. Award Date: 03/23/2018
Q & A:	Start Receiving On: 03/23/2018	Reject After: 04/02/2018 0:00	
Website:	A Zero(0) below indicates the opportunity will be displayed 120 days after Opening (By Default) You may override the default by entering a specific number of days, if needed. Days Displayed After Opening Date: 120 Stop Display Date: Display To Web		
Add Opportunity Category Add Opportunity Addenda			
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Buttons: Save | Reset | Main Menu

Footer: state home | OIT home | DAS home | site map | contact DAS

- ❖ Immediately after opening change status
- ❖ Change status again after award or cancellation



Questions?



Contact Procurement Support for any additional assistance @ 614-466-5090



State Administrative Policies: PM-01 & PM-02
Andrew Cochran, Project Manager



PM-01

Purchasing Procedures

- Multi-agency effort
- Replacement of GS-D-12
- Highlights:
 - Format changes
 - Requisite procurement program guidance
 - New State Term Schedule (STS) quoting requirements
 - Non-STs quoting requirements & thresholds (increase from \$500 to \$2,500)
 - Veteran's Preference
 - 5% preference on bids and proposals
 - Does not compound with Buy Ohio

Ohio Department of Administrative Services
John Kasich, Governor
Robert Blasi, Director

OhioDAS

No. Procurement
PM-01

State of Ohio
Administrative Policy

Effective: [Month] [Day], [Year]

Issued By:
[Director's Signature]

Purchasing Procedures

Robert Blasi, Director

1. Purpose

The purpose of this policy is to provide general purchasing guidance to assist state agencies, boards, and commissions ("State Agencies") superintended by the Department of Administrative Services (DAS) with exercising appropriate purchasing authority.

A glossary of terms found in this policy is located in Appendix A - Definitions. The first occurrence of a defined term is in **bold italics**.

2. Policy

DAS is the State's central procurement authority for general and information technology (IT) supplies and services and is responsible for establishing contracts used by State Agencies to procure such supplies and services. It is the State of Ohio's policy that all procurements will be conducted in a fair, open, and transparent manner. State Agencies are governed by the following requirements:

2.1. **Requisite Procurement Programs:** Law and administrative rule require that State Agencies must purchase from certain state resources, also known as requisite procurement programs, prior to making the purchase from another source. Before making any purchase, State Agencies must comply with Ohio Revised Code (R.C.) 125.015 and 125.05 and Ohio Administrative Code (OAC) 125.5-5-17 and work directly with the applicable requisite procurement program or submit a request to purchase at <http://apps.das.ohio.gov/requesttopurchase/requestform.aspx> for purchases of supplies or services potentially valued at twenty-five thousand dollars or more to determine if the supplies or services are available from any of the following requisite procurement programs, in the order they are listed:

The Ohio Department of Administrative Services
Ohio's Procurement Services | 2025 Version | 12/2024
Columbus, Ohio 43229-2444 | 614.753.6779 | procurement@das.ohio.gov | www.ohio.gov

King Services, Inc. | 614.753.6779



PM-02

Emergency Purchasing Procedures

- Highlights:
 - Before, during, and after an emergency or state procurement emergency
 - Permits procurements in excess of R.C. 125.05 thresholds if needs cannot be met through normal procurement methods
 - Give notice to DAS, OBM Director, & Controlling Board
 - Same post-incident reporting requirements for state procurement emergencies as for emergencies

Ohio Department of Administrative Services
John Kasich, Governor
Robert Blair, Director

OhioDAS

Procurement
PM-02

Effective: [Month] [Day], [Year]

Issued By: [Director's Signature]
Robert Blair, Director

1.0 Purpose

Occasionally, a situation may occur that requires the expedited purchase of supplies and/or services. These situations may also make it difficult to follow standard procurement policies and procedures that have been established by the Department of Administrative Services (DAS), including Ohio Administrative Policy (OAP) PM-01 Purchasing Procedures.

The purpose of this policy is to provide State Agency officials with information regarding procurements during an emergency or state procurement emergency to facilitate fast and efficient procurement of supplies and services during these events.

A glossary of terms found in this policy is located in Appendix A - Definitions. The first occurrence of a defined term is in bold italics.

2.0 Policy

State Agencies that must buy supplies and/or services from suppliers during an emergency or state procurement emergency are expected to adhere to the following. Purchases shall be limited to those supplies and/or services necessary to respond to the emergency or state procurement emergency.

2.1 **Prepare for an Emergency or State Procurement Emergency:** State Agencies should prepare for emergencies and state procurement emergencies by adhering to the following guidelines:

2.1.1 Identify supplies and/or services that could be needed or may potentially be exhausted during an emergency or state procurement emergency.

The Ohio Department of Administrative Services
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Next Steps

- Final edits
- Final approvals
- Publish



OhioDAS

SERVICE · SUPPORT · SOLUTIONS
DEPARTMENT OF ADMINISTRATIVE SERVICES

Amazon Business; State Procurement Manual
Steve Meese, Project Manager, DAS



Amazon Purchases

Amazon Business

- Rollout completed November 2017
 - 61 agencies, boards and commissions with accounts
 - 408 users
 - 5 agencies and 54 users in prior to rollout
- Spend during last 12 months = \$408,201
 - 2,344 orders placed
- Areas of interest
 - Tax exemption
 - Shipping costs
 - Business analytics
 - Others?
- Amazon Business Resources



State Procurement Manual

Workgroup Members

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Andrew Cochran – DAS



Questions?





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DISCUSSION