



Agency Procurement Officers Meeting



A+ - Agile

S - Streamlined

E - Effective

R - Responsive

V - Value-based

I - Innovative

C - Customer-focused

E - Ethical

August 22, 2017



Office of Procurement Services

Welcomes New Team Members:

Steve Meese, Project Manager

Jodie Machado, CTV / RTP
Coordinator





State Term Schedule (STS) Purchase Requirements

Kelly Sanders



STS Purchase Requirements

New Requirements

- Enhanced transparency measures in FY18/19 Controlling Board waiver.
- Affects FY18/19 purchase orders referencing STS as the purchase authority and projects continued from the prior fiscal year.
- Quarterly reporting of state agency STS purchases to Controlling Board.
- Publicly available on-line database by 12/31/17



STS Purchase Requirements

All purchases referencing an STS contract as the purchase authority require three or more quotes.

- Quotes must be obtained, not just solicited.
- A “no response” or “no bid” is not considered to be receipt of a valid quote.
- Suppliers providing quotes do not have to be STS contract holders or dealers.
- If fewer than three quotes are obtained, agencies must request a waiver of competitive selection from the Controlling Board prior to making the purchase.



STS Purchase Requirements

Continuations

- If three or more quotes were received when the original procurement occurred, additional quotes do not need to be received prior to creating the FY 18 purchase order.
- If three or more quotes were not received, an agency can:
 - ✓ Pause and re-compete the remaining work to obtain three quotes; or
 - ✓ Request the Controlling Board to grant a waiver of competitive selection; or
 - ✓ Explore procurement options other than STS.

Direct Authority

- Agencies can continue using their purchase authority to make purchases from STS contract suppliers up to \$49,999.99 per supplier per fiscal year without referencing an STS contract as the purchase authority.



STS Purchase Requirements

Payment Cards

- Agencies can continue using payment cards to make STS purchases (three-quote requirement applies).
- Agencies can also elect to use their direct purchase authority and not reference the STS contract.

MBE Set-Aside

- The new STS purchase requirements do not make exceptions for MBE set-aside purchases.
- Agencies will continue to receive set-aside credit for STS purchases (three-quote requirement applies).



STS Purchase Requirements

OIT Release and Permit

- Use STS purchase authority within the Release and Permit application when an agency obtains fewer than 3 quotes and Controlling Board approval is required to use the STS Purchase authority
- Attach all quotes obtained
- Approval letter includes instruction to agency that Controlling Board approval is required prior to processing a purchase order



STS Purchase Requirements

STS Contract Purchase Forms

- Required for all purchases that reference an STS contract as the purchase authority.
- Automatically populate the quarterly report

Key Action Steps

- Review for quality and accuracy
- Avoid sensitive and subjective information

The image displays four overlapping screenshots of the OAS Financials system interface. The top-most screenshot shows the 'Req Quote Details' screen with fields for Business Unit (DAS), Supplier ID (000), and Req Name (PJK). Below it is the 'pCard Quote Details' screen with fields for Employee ID (10001134), Card, Tran Nbr (24435656), Billing Date (05/21/2017), Merchant (BROWN I), and Supplier (Reference: 24435656). The third screenshot is the 'INF PO Quote Details' screen, showing Business Unit (DMH01), PO Number (000071491), Purchase Order Date (09/09/2017), Supplier ID (0000225253), Name (REIDY MEDICAL SUPPLY INC), and PO Reference (RS1125816). The bottom-most screenshot is the 'Interfaced PO Quote Details' screen, featuring a table with one row of quote data.

Line Number	Item Descr	Unit of Measure	Purchase Order Quantity	Purchase Order Price	Total
1	BARRIER SKIN 2-1/4IN FLANG E HOLLISTER 14603 5BX	BOX	10.0000	25.23000	252.30



STS Purchase Requirements

STS Contract Purchase Report

- Available in two run layouts
- Quote Details layout
 - ✓ Displays all STS transactions and their quotes
 - ✓ Will be provided to Controlling Board quarterly
- Exceptions layout
 - ✓ Monitor STS transactions without a completed STS Contract Purchase Form.
 - ✓ Report sent to CFOs and APOs every Friday

The screenshot displays the Ohio Cognos Connection BI Portal interface. The breadcrumb trail is: Public Folders > BI Reporting Folders > BI Standard Reports > FBI > Procure to Pay > Vendor Analytics. A list of reports is shown, with 'VA-0011 STS Contract Purchase Form' highlighted in red. To the right, a configuration window for the 'VA-0011 STS Contract Purchase Form Report' is open. It shows two layout options: 'Quote Details - Transactions Along With Any Associated Quotes' and 'Exceptions - Transactions with No Associated Quotes'. The 'Quote Details' option is selected. Below this, a list of business units is shown with checkboxes: AAMD1, ACCD1, ADD01, ADJ01, AFC01, AGE01, AGO01, AGR01, and AIRD1. The 'From' and 'To' date fields are both set to Jul 1, 2017. There are also empty input fields for 'Contract Number Starts With' and 'Amount Greater Than'.



New LexisNexis Contracts

Andrew Miller





New LexisNexis contracts: MLA0059 – LN Risk MSA0050 – LN Advance

These contracts replace the previous State Term Schedule contract No. 7776000109.

LN Risk and LN Advance are two separate entities with separate contract Terms & Conditions.



LexisNexis Risk Products

These require individual user agreements be executed and a guidance document has been provided to assist in understanding that process.

At the Procurement Website's Current Contract Detail page, under General Information, click to view the Comments/Memo: "LexisNexis Risk Contractual Guidance Document, pricing and contract."



LexisNexis Advance Products

At the Procurement Website's Current Contract Detail page, under General Information, click to view the Comments/Memo: "Master Services Agreement and pricing for LexisNexis Advance subscriptions."



**Thank You from
the DAS Enterprise
IT Contracts.**





OhioDAS

SERVICE · SUPPORT · SOLUTIONS
DEPARTMENT OF ADMINISTRATIVE SERVICES

Statewide Procurement Policy and State Surplus Updates

Andrew Cochran





Statewide Procurement Policy:

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



Statewide Procurement Policy: PM-01 *Purchasing Procedures*

- Feedback on GS-D-12: focus policy towards basic procurement processes
- Address other topics separately
 - Written Contracts: The FIN Source Written Contracts Policy
 - Pcard: The FIN Source
 - Emergency Purchasing: PM-02 Emergency Purchasing Procedures
- Cross-references



Statewide Procurement Policy:

PM-02 *Emergency Purchasing Procedures*

- FY18-19 Operating Budget bill
- 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



State Surplus Updates

- “Cash Register” System
 - 2016 Internal Audit:
 - Improve inventory management
 - Replace obsolete systems
 - Notable changes
 - Agency involvement
 - Online applications
 - Online turn-in documents
 - Turn-in documents – 1st step in process
 - Expected rollout Fall, 2017



State Surplus Updates

- Online Sales/Auctions
 - Contract with [GovDeals](#)
 - Awarded August, 2017
 - Goals:
 - Better presentation of available property
 - Draw more attention to available property
 - Increase return on investment
 - Outreach campaign



Amazon Business

Steve Meese





ODX

OH|ID



OhioDAS

SERVICE · SUPPORT · SOLUTIONS
DEPARTMENT OF ADMINISTRATIVE SERVICES

Supplier Portal
Jason Bartholow



Supplier Portal

Supplier.Ohio.gov

Home Self-Service Apps Login Test Help Center

Quick Links

- Register as a Supplier
- Current Contract Search
- Bid Opportunities Search
- State Printing and Mail Services
- Agency request to purchase
- Procurement Related Vendor Links

Already Registered

Enter your Tax ID in the field below to see if your business is already registered as a Supplier to the State of Ohio.

Tax ID *

Search

Supplier portal is a self-service application that provides Suppliers access to view their organization's profile information held by the state as well as the real-time status of their purchase orders, invoices and payment information. For questions related to the Supplier Portal, please contact the Office of Budget and Management - Ohio Shared Services Department at: 1-877-644-6771 (Monday-Friday 8am-5pm EST.)

NEW VENDORS: Please ensure that you complete the entire registration process, including selecting commodity codes as the last step, in order to ensure that you receive notifications about solicitations.

FAQs Privacy Statement Copyrights Contact

- Improved User Experience
- Powered by OAKS-FIN
- Customizable Interface
- Responsive Design
 - Phone / Tablet



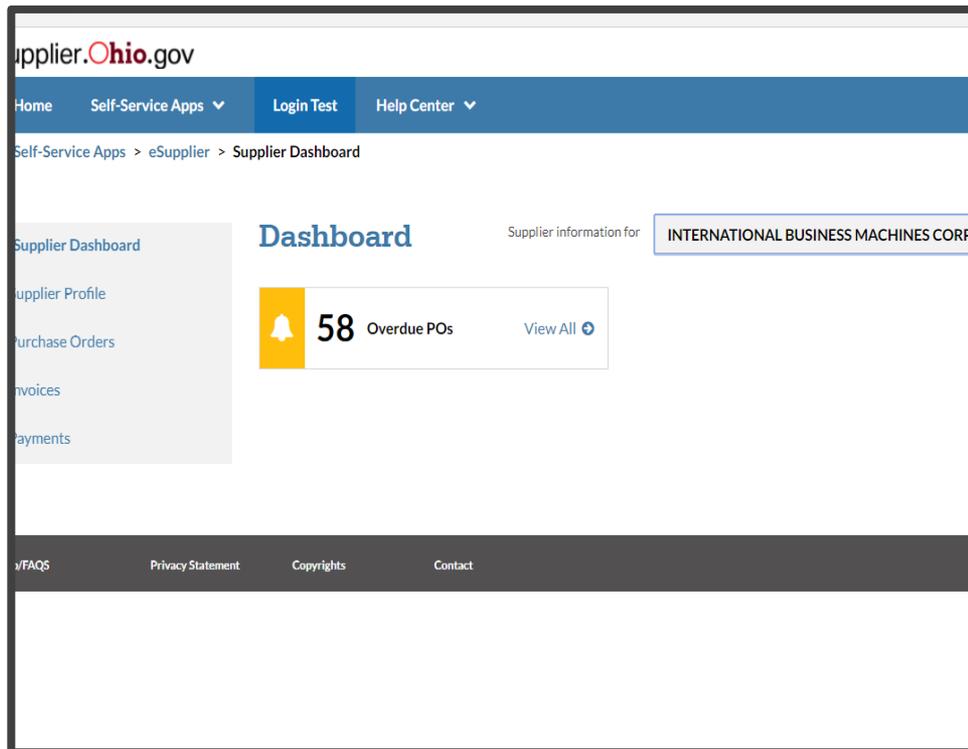
Registration

- Data gathered aligns to OAKS
- Customized Interface
- Enhanced User Experience

The screenshot shows the registration interface on the supplier.Ohio.gov website. At the top, there is a navigation bar with links for Home, Self-Service Apps, Login Test, and Help Center. Below this, the page title is 'Self-Service Apps > Registration'. A 'Welcome' section provides instructions and contact information for Ohio Shared Services. A progress bar with seven steps is shown: Welcome, Identifying Information, Addresses, User Information, Payment Information, Commodity Codes, and Submit. The main content area offers two options: 'Create New Account' with a 'Start >>' button, and 'Choose one of your saved registration processes'. A note states 'The on-boarding process will take 5 minutes to complete.' Below the second option, it says 'OR You do not have saved registration processes.' The footer contains links for Help/FAQs, Privacy Statement, Copyrights, and Contact, along with the Ohio.gov logo.



Business Transaction Data



- Information Auto-Displayed by User
- Change Supplier View
- Dashboard
- Transaction Views
 - Purchase Order
 - Invoices
 - Payments



Cost Per Copy

David Colopy





Cost Per Copy – MAC009 RS904315

- Currently working on new solicitation; expecting November 1 award.
- State Term Schedule Impact - Consumables to be removed
- New Authorization Form Pending – Single Form, will provide guidance on all options to make best decision
- Consider CPC first
- DAS Office of Procurement & State Printing available to assist in selecting best fit for your agency.



Help Me Help You

Cassy Branson





Research and Reporting Unit

Mission Statement

It is the mission of the Research and Reporting Unit to ensure equal opportunity to government contracting by consistently providing accurate and timely program data for the Minority Business Enterprise (MBE) and Encouraging Diversity, Growth and Equity (EDGE) programs.



Flag Adjustments

- **Help me by:**
 - Putting *all* requests in writing
 - Including the company name, voucher number, current flag, and desired flag
 - Confirming contract was properly bid MBE
 - Submitting *all* requests by the 10th of each month
- **I will help you by:**
 - Adjusting the flags and submitting a response once it is completed
 - Identifying potential missed MBE dollars
 - Providing training if requested



Vendor Searches

- **Help me by:**
 - Providing lead time
 - Providing scope of work - “front end language” from the contract
- **I will help you by:**
 - Providing a list of currently certified vendors to contact
 - Providing outreach to non-certified vendors if needed
 - Offering 2nd tier option suggestions
 - Providing contacts at other agencies who can offer suggestions
 - Providing an open line of communication with GSD for requesting capabilities statements



Accurate Projection Plans

- **Help me by:**
 - Submitting completed and signed plans
 - Promptly notifying me if an extension is needed
 - Returning revised plans right away
 - Asking questions
- **I will help you by:**
 - Scheduling a meeting to go over prior spend and plans (*if necessary*)
 - Revising the projection plan template for FY2019
 - Identifying MBE vendors available for purchases
 - Using non-MBE spend as a catalyst for recruitment



Referencing Correct Account Codes

- **Help me by:**
 - Referring to OBM.Ohio.gov
 - Getting rid of ALL old versions of the excluded account code lists
 - *Asking questions*
- **I will help you by:**
 - Sending out notifications when codes change
 - Spot checking spend reports



OAKS Agency Engagement

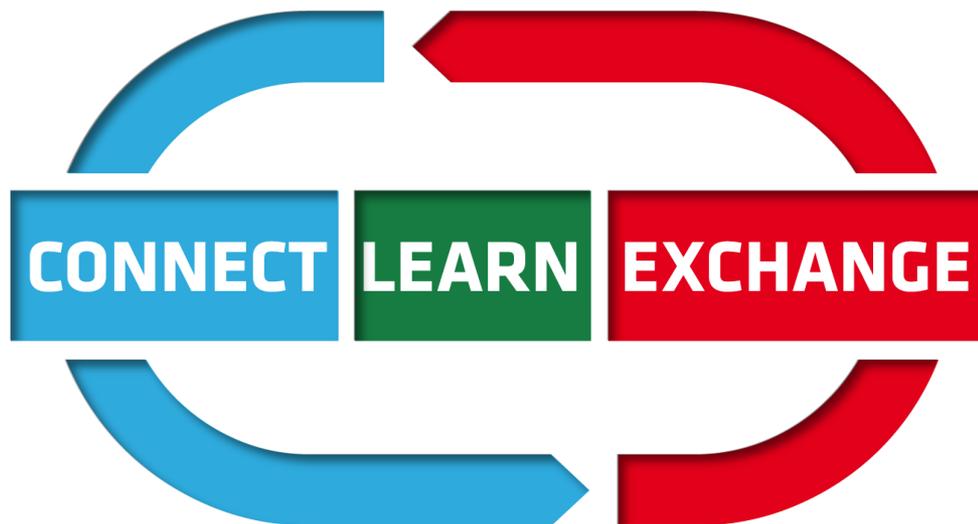
Engaging people, elevating results

Joe Banicki





OAKS Agency Engagement



Improving the solutions OAKS Enterprise offers and the knowledge agencies have of them



Supporting Business Owners Across OAKS Enterprise Services



Human Resources Division (HRD)

- HCM
- ePAR
- ePerformance
- Kronos
- OHMS



General Services Division (GSD)

- Procurement
- Asset Management



Office of Budget and Management (OBM)

- Accounts Payable
- General Ledger
- Accounts Receivable
- Billing
- Supplier Portal
- Travel & Expense
- Grants

3 Ways We Can Help

- 1** Consistent organizational change management on OAKS projects and services
- 2** Customer outreach for OAKS functionality and services
- 3** OAKS Agency Liaison Network





Integrated and Collaborative Partnerships

Agency Engagement applies standard OCM tools and templates

- Prepares people for changes
- Assesses impacts and readiness
- Builds plans for sponsorship, communication, readiness, training, and reinforcement



Project management directs overall planning and project execution

Business is the strategic driver and decision maker; defines the need for change and the steps to achieve it



Customer Engagement with Agency Leaders



OAKS Projects?

OAKS Functionality?

OAKS Services?

Continuous Improvement Opportunities?

Contact us at OAKSengagement@das.ohio.gov



OAKS Agency Liaison Network

To engage in ongoing dialogue with the goal to improve the solutions OAKS Enterprise offers and the knowledge agencies have of them



Helping agencies see how the OAKS pieces fit together



OAKS Agency Liaison Network



1. Actively share OAKS information with liaisons each month
2. Provide tools and messages to share with agency stakeholders
3. Provide 2-way communication opportunities
4. Listen openly to feedback and suggestions on OAKS projects and services
5. Gather and distribute feedback to appropriate OAKS personnel



Build Your Internal OAKS Agency Network





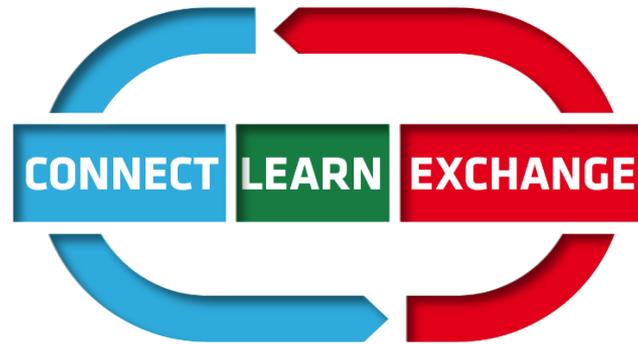
Roles of the FIN User Groups

OBM and DAS will be working with the Agency FIN Leads to develop FIN User Groups (for all modules) to:



1. Provide feedback on OAKS functionality and services
2. Carry out key project tasks
3. Participate in user acceptance testing as needed

Reminder – OBM and DAS are also hosting OAKS FIN Q&A sessions the week of September 18th. Register for the webinar(s) and submit your questions!



- 1** Learn more about OAKS functionality and services
- 2** Be a part of the OAKS Agency Liaison Network
- 3** Apply organizational change management tools and templates to projects within your agency

OAKSengagement@das.ohio.gov





OAKS Training and Help Desk Overview
James Yagodich





**“I’m always ready to learn... although I do not always like being taught.” –
Winston Churchill**





How Do I...





OAKS Training

- Enterprise Best Practices
- Step-by-Step
- Classroom Opportunities
- Online Quick Reference Help



I Need Help!





OSS Contact Center



Contact Information:

614-338-4781

OhioSharedServices@ohio.gov



The Ohio Public Procurement Services Training Academy

The Ohio Public Procurement Certification Program

Wayne McCulty





The DAS Procurement Services Training Academy

- **Current Situation:**
 - ~ OAKS Training & Help Desk
- **Training Expansion Plan:**
 - ~ Ohio Public Procurement Training & Certification Program
 - ~ Specialized Supplier Trainings
 - How to do business (Quarterly Sessions / webinars)
 - Special Programs (MBE; CRP)
 - ~ Agency Training Sessions
 - Tailored to Agency Requests
- **Procurement Internal Training**
- **Knowledge Management Repository SharePoint Site**



The Ohio Public Procurement Certification Program

- **Certification history with the Office of Procurement Services**
 - ~ PD requirements for OPS Analysts and Managers
- **2014 UPPCC eligibility changes**
 - ~ Mandatory degree requirements
- **Ohio Public Procurement Certification Program as an equivalent to UPPCC**
 - ~ Tailored to Ohio laws, rules, procedures, and practices
 - ~ Two day Certification Training Sessions & examination for DAS only in FY2018
 - ~ Target to roll out to Agencies in FY19 as a 2nd phase



Let's Discuss...

