

# AGENCY PROCUREMENT OFFICERS MEETING

AUGUST 20, 2013

**OhioDAS**  
Service · Support · Solutions

General Services Division

# APO MEETING

*Welcome*



Gretchen Adkins,  
Chief Procurement Officer  
Department of Administrative Services

# DIRECTOR'S COMMENTS

## *Sharing Information*

Robert Blair,

Director

Department of Administrative Services



# MBE SET ASIDE

## *Direction from the Governor*

Rand Howard,

Assistant Director

Department of Administrative Services



# MBE SET ASIDE

## *Methodology*

Todd McGonigle,

EEO Program Manager

Department of Administrative Services



# MBE SET ASIDE

## Agenda –

- Methodology to complete the MBE Set-Aside Plan
- Tools to assist in the completion of the MBE Set-Aside Plan
- Demonstration completing an MBE Set-Aside Plan

# MBE SET ASIDE

## Methodology

Analysis of the principles or procedures...

# MBE SET ASIDE

## Methodology - Principles

- Program Existence
  - Why Program was made
- Credit vs. Planning
  - ORC 125.081 (A) & (B) (Handout)
- Program Type
  - Planning
  - Executing
  - Replacing

# MBE SET ASIDE

## Methodology – Principles

- Barrier Elimination
  - ORC 125.081 - The procedures for such purchases shall be the same as for all other such purchases made by the agency, except that only minority business enterprises certified by the equal employment opportunity coordinator in accordance with rules adopted under division (B)(1) of section 123.151 of the Revised Code shall be qualified to compete.

# MBE SET ASIDE

## Methodology - Procedures

- Annual Projection Plan
  - Due August 30, 2013
- Quarterly Reporting 123.151
  - Shall file a report every ninety days with the equal employment opportunity coordinator.
  - The report shall be filed at a time and in a form prescribed by the coordinator.

# MBE SET ASIDE

## Methodology - Procedures

- The report shall include the name of each minority business enterprise that the agency or port authority entered into a contract with during the preceding ninety-day period and the total value and type of each such contract...
- **Due Dates**
  - 1<sup>st</sup> Quarter – October 15, 2013
  - 2<sup>nd</sup> Quarter – January 15, 2014
  - 3<sup>rd</sup> Quarter – April 15, 2014
  - 4<sup>th</sup> Quarter – July 15, 2014

# MBE SET ASIDE

## Methodology - Procedures

- Reconciliation Meeting Due Dates –
  - 1<sup>st</sup> Quarter – October 22 – November 6, 2013
  - 2<sup>nd</sup> Quarter – January 22 – January 31, 2014
  - 3<sup>rd</sup> Quarter – April 22 – May 2, 2014
  - 4<sup>th</sup> Quarter – July 22 – August 1, 2014
- Publish –
  - 1<sup>st</sup> Quarter – November 15, 2013
  - 2<sup>nd</sup> Quarter – February 5, 2014
  - 3<sup>rd</sup> Quarter – May 15, 2014
  - 4<sup>th</sup> Quarter – July 22 - August 15, 2014

# MBE SET ASIDE

## Tools –

- EOD Reports –  
<http://das.ohio.gov/Divisions/EqualOpportunity/AgenciesBoardsCommissionsCollegesUniversiti.aspx>
  - EOD-0001: Vendor Utilization Analysis Report
  - EOD-0002: EDGE Contract Type Report
  - EOD-0003: EDGE Subcontract Payments Report
  - EOD-0004: EDGE Contract/Project Waiver Report
  - EOD-0005: MBE/EDGE Flag Adjustment Audit Report
  - EOD-0006: Voucher Identified as Flagged Non-Certified MBE/EDGE Report
- Agency Adjustment Module
- Fiscal Year 2014 Minority Business Enterprise (MBE) Set-Aside Plans Template
- Quarterly Reporting Form
- Reconciliation Form

# MBE SET ASIDE

## Questions

Contact Information:

**Todd McGonigle, EEO Program Manager**

[Todd.mcgonigle@das.state.oh.us](mailto:Todd.mcgonigle@das.state.oh.us)

614-466-8380

# MBE SET ASIDE

## *Request to Purchase*

Jean Stephenson,

Contracts Manager

Office of Procurement Services

Department of Administrative Services



# MBE SET ASIDE

Agency Request to Purchase (RTP)

MBE Set Aside Determination

*in 10 easy steps...*

# MBE SET ASIDE

## ***Step 1...***

Upon receipt of the agency's Request to Purchase, the RTP is logged and assigned to the appropriate procurement team manager

# MBE SET ASIDE

## ***Step 2...***

The RTP is reviewed to determine

- Scope of work/specifications
- Agency comments/recommendations
- Existing contracts
- Attachments

# MBE SET ASIDE

## ***Step 3...***

Procurement manager identifies appropriate UNSPSC codes and “key words” for use in conducting a search for certified MBE vendors on the Equal Opportunity Division website

# MBE SET ASIDE

## ***Step 4...***

An email providing the Statement of Work and Minimum Requirements for this *potential* MBE set aside opportunity is sent to identified vendors, approved by EOD, to ensure they can meet the requirements. Turnaround time is 10 days.

### **Distribution list contains:**

- Identified certified MBE vendors
- Minority Business Assistance Centers (MBAC) Directors
- Procurement Technical Assistance Centers (PTAC) Directors
- Members of the Minority Business Advisory Council

# MBE SET ASIDE

## ***Step 5...***

Depending upon the number of responses to the Statement of Work and Minimum Requirements email, and, in consultation with EOD, a recommendation for an MBE Set Aside solicitation is made

# MBE SET ASIDE

## ***Step 6...***

If the recommendation is for an MBE Set Aside solicitation, the list of identified MBE vendors is emailed to the procurement manager and assigned analyst. The analyst will conduct further analysis on the vendor list

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## ***Step 7...***

The procurement manager brings the recommendation to procurement methodology meeting for final approval and the identification of the best methodology (ITB/RFP/STS)

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## ***Step 8...***

The RTP determination is emailed to the agency and includes the name of the assigned analyst

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## ***Step 9...***

A follow-up email is sent to the list of identified MBE vendors and distribution list recipients that the opportunity has been recommended as an MBE set aside

# MBE SET ASIDE

## ***Step 10...***

Lastly, when the bid is posted, all certified MBE's receive a bid opportunity notice

# MBE SET ASIDE

*Questions?*



## Contact Information

Jean Stephenson, OPS Contracts Manager

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614-644-8495

# MBE SET ASIDE

## *Practical Application*

Beverly Hoskinson,

Manager, Fiscal Operations

Department of Mental Health and Addiction Services



# MBE SET ASIDE

## *Practical Application*

To successfully deliver MBE Set Aside compliance the following is essential to ensure success;

- Leadership Support
- Budget Process
- Procurement Process
- Analytical Monitoring
- Engage Assistance

# MBE SET ASIDE

## *Practical Application*

### Leadership Support

- Management/Leadership commitment and involvement is key to secure MBE Set Aside.
  - The success of obtaining the Set Aside requirement is nearly impossible without management/leadership support



# MBE SET ASIDE

## *Practical Application*

### Budget Process

- Depending on the Agency/Department budget model, MBE/Edge planning can not occur without useful budget reports.
  - The budgeting level of account code is critical
    - Recommended: Minimum 4 digit account code budgeting is extremely necessary to capture eligible MBE accounts and to develop inclusion plan
  - Detailed planning documents from each office or section can help guide the planning process (i.e. IT planned purchases, equipment, goods and supplies) based on a modified zero-based budgeting model

# MBE SET ASIDE

## *Practical Application*

### Procurement Process

- Internal policies/procedures require review and perhaps modification to ensure compliance. Clearly identify the procurement difference between Set Aside and Participation.
  - Utilize DAS Term Contracts to assist with MBE Set Aside
  - Utilize 15% of Direct Spending Authority ensuring MBE “sheltered” process is implemented. NOTE: budget reports are critical to ensure effectiveness.
    - Selection of goods or services MUST be obtained from a “sheltered competition” process to be considered MBE Set Aside

# MBE SET ASIDE

## *Practical Application*

### Analytical Monitoring

- Consistent review of MBE “eligible” expense accounts.
  - Identify missed opportunities and coding errors
  - Monitor your inclusion plan and modify when necessary

### Engage Assistance

- Engage DAS EOD staff for assistance in identifying opportunity within account groups
- Engage your Agency/Department EEO officer and DSA (Development Services Agency) for assistance in obtaining vendor certification

# MBE SET ASIDE

## *Practical Application*

Questions or Comments ??

# MBE SET ASIDE

## In Summary;

- Leadership Support
  - Key to successful compliance
- Budget Process
  - Meaningful reports are necessary
- Procurement Process
  - Clearly identified process ensures success
- Analytical Monitoring
  - Review of reports
- Engage Assistance
  - Involve DAS/EOD and DSA

# MBE SET ASIDE

## *Quote of the day....*

“The only way of finding the limits of the possible is by going beyond them into the impossible.”

- **Arthur C. Clarke**

Contact information for Beverly Hoskinson

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Phone: 614-752-6463



# *MBE SET ASIDE APPLICATION*

## *Practical Application*

David Jende

Accounts Payable & Procurement Officer

Development Services Agency



# *MBE SET ASIDE APPLICATION*

## *My Roles At Development*

Agency Procurement Officer

Accounts Payable Supervisor

Agency PCard Administrator

Agency MBE EEO Officer

Agency OAKS Security Designee

# *MBE SET ASIDE APPLICATION*

## *MBE Practices at Development*

### EOD MBE Projection Plan

- ❖ List all anticipated purchases for the approaching fiscal year.
- ❖ Identify definite and highly probable MBE Set Aside purchases.
- ❖ Update throughout the fiscal year.
- ❖ Can highlight major MBE Set Aside gaps for the approaching fiscal year.
- ❖ Can help DAS to determine contract or STS opportunities.

# *MBE SET ASIDE APPLICATION*

## *MBE Practices at Development*

### Procurement Policies

- ❖ Forget about your MBE Projection Plan... Well, sort of.
- ❖ Strict adherence by an agency to an MBE Projection Plan may lead to missed goals.
- ❖ Most projected MBE Set Aside purchases may actually occur; some will not due to reduced budgets, or lack of vendors, vendor participation or required experience.
- ❖ Projected MBE Set Aside purchases are not always easily replaced.
- ❖ What is the solution?

# *MBE SET ASIDE APPLICATION*

## *MBE Practices at Development*

### Procurement Policies, cont.

- ❖ Solution... Think MBE first.
- ❖ Approach every new purchase as if it will be an MBE Set Aside.
- ❖ Purchases that cannot will weed themselves out; sole source, lack of vendors, etc.
- ❖ Not trying to make every purchase an MBE Set Aside will lead to missed opportunities.

# *MBE SET ASIDE APPLICATION*

## *MBE Practices at Development*

### Modified PCard Policies

- ❖ Most purchases within the PCard limits are at the cardholder's discretion.
- ❖ Tighter controls over the IT office's Pcard.
- ❖ Almost all IT purchases should be an MBE Set Aside.
- ❖ An ipad here and a scanner there, although only \$500 each, can significantly add up over the fiscal year.
- ❖ A little more work is required on the procurement side, but 3 quotes or a quick 3-day RFQ is all that is required.

# *MBE SET ASIDE APPLICATION*

## *MBE Practices at Development*

### Agency Leadership Support

- ❖ Confidence that purchases that can be MBE Set Aside will be MBE Set Aside.
- ❖ Helps to limit pushback/resistance from individual agency offices.
- ❖ Makes it easier to implement policies beneficial to MBE Set Aside goals.

# *MBE SET ASIDE APPLICATION*

*MBE Practices at Development*

Questions?



**MARKETPLACE**  
**eCatalog**

Shop • Procure • Pay

## *Ohio Marketplace Update*

Jean Stephenson,

OPS Contracts Manager

Department of Administrative Services





# MARKETPLACE eCatalog

Shop • Procure • Pay

The Ohio Marketplace is *LIVE*...as of August 5, 2013!

- A combined effort by DAS and Ohio Shared Services (OBM) given the inherent relationships between the Procure to Pay functions.
- Provides a similar experience as one would have when shopping from an internet site such as Amazon.
- Allows users to search for goods and services available from approved eCatalogs and returning information to OAKS to complete the workflow.



# MARKETPLACE eCatalog

Shop • Procure • Pay

Awarded provider **SciQuest** is a leading eProcurement service provider that utilizes a shared supplier architecture.

Ohio's agreement with SciQuest resulted from our participation in a National Association of State Procurement Officials/ Western States Contracting Alliance (NASPO/WSCA) consortium contract.



# MARKETPLACE eCatalog

Shop • Procure • Pay

**The SciQuest eCatalog** tool is one of several tools and techniques we use to more effectively manage sourced spend

## What can it do?

- Provide agencies with easy-to-use purchase ordering, requisitioning, invoicing, payment
- Provide easier price comparisons among vendors with same or similar products
- Provide DAS with spend analysis and identification of buying power opportunities
- Funnel demand to targeted contracts
- Facilitate e-Invoicing and prompt pay
- Reinforce adherence to policies and priorities
- Integrate into OAKS Financials for requisition approvals and budget checking



**MARKETPLACE**  
**eCatalog**

Shop • Procure • Pay

## Vendor selection process for the pilot ...

- Currently hold a DAS/State of Ohio contract
- Selected based on analysis of low dollar/high transaction agency spend
- Commodities with multiple vendors make the best fit for product and price comparison
- Contract categories with MBE representation are considered
  - Vendor pushes 1 and 2 (25 vendors)
  - Vendor push 3 (22 vendors) in progress
  - Vendor push 4 (65 vendors) to begin late August



# MARKETPLACE eCatalog

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Supplier Enablement Dashboard			
Vendor Participation	Status		
<b>Push 1 and 2</b>			
Catalog Type	Participating	Pending	Not Participating
Punchout	6	0	6
Punchout (Consortium)	0	0	0
Hosted	4	0	0
Self Managed	5	0	0
Client Managed	2	0	1
Item Master	0	0	1
<b>Totals for Push 1 and 2</b>	<b>17</b>	<b>0</b>	<b>8</b>
<b>Push 3</b>			
Catalog Type	Participating	Pending	Not Participating
Punchout	0	0	0
Punchout (Consortium)	0	0	0
Hosted	2	2	1
Self Managed	0	0	0
Client Managed	4	1	2
Item Master	2	7	1
<b>Totals for Push 3</b>	<b>8</b>	<b>10</b>	<b>4</b>
<b>Totals</b>	<b>25</b>	<b>10</b>	<b>12</b>



# MARKETPLACE eCatalog

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## 17 eCatalogs are available in the following categories

- Office Supplies
- Medical Supplies and Lab Equipment
- General Hardware
- Apparel
- Law Enforcement Supplies

Suppliers	
Grainger	PerkinElmer
Superior Industrial Supply & Services, Inc. (MBE)	Bode Technology
MRO Express LLC (MBE)	VWR International, Inc.
Direct Resources (MBE)	Fastenal
MSC Industrial Supply Company	D. Johnson Enterprises
Yaro Supply Company (MBE)	Snap-On
Quality Building Supplies for Industry, Inc. (MBE)	Direct Resource (Distributor for Sexauer)
Reico Supply (MBE)	Sherwin Williams
Fisher Scientific	Staples



**MARKETPLACE**  
**eCatalog**

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## Pilot agency schedule

### August 5 – September 30, 2013 (Pilot period)

- DRC - Department of Rehabilitation and Corrections
- DPS - Department of Public Safety
- DMHAS - Department of Mental Health and Addiction Services
- DOH - Department of Health
- DNR - Department of Natural Resources



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**eCatalog**

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## Agency Rollout Plan

**October 1, 2013 – January 30, 2014**

Approximately 18 agency business units  
to be rolled out each month (72 total)



# MARKETPLACE eCatalog

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## Training

- 30 minute web-based training (*mandatory*) to establish OAKS roles. (256 staff have completed)
  - Web-based training must be completed prior to scheduling instructor-led training.
- Instructor-Led training (*optional*) @ GSD (21 classes have been held)
  - 12 staff have completed
  - 10 enrolled for this week's sessions:
    - August 21 – 1:30 PM – 4:30 PM
    - August 22 – 8:30 AM – 11:30 AM and 1:00 PM – 4:00 PM
    - August 27 – 8:30 AM – 11:30 AM
    - August 29 – 8:30 AM – 11:30 AM
  - Additional sessions will be scheduled based on current enrollment stats. If demand increases, more classes will be added.



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## Pilot Agency Participation as of August 5...

- 14 purchase orders in the Ohio Marketplace sent to vendors. 4 are P-card purchases
- Pilot agencies are urged to **increase** their use of the Ohio Marketplace in making their purchases
- Let's work together to make the Ohio Marketplace a success!



**MARKETPLACE**  
**eCatalog**

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# *Questions?*

## **Contact Information**

Jean Stephenson, OPS Contracts Manager

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614-644-8495

# UNIVERSAL PUBLIC PROCUREMENT CERTIFICATION COUNCIL (UPPCC)

## *CPPO/CPPB Certification Changes*

Alan Childress,

Purchasing Manager

Department of Administrative Services



# UNIVERSAL PUBLIC PROCUREMENT CERTIFICATION COUNCIL (UPPCC)

## Current CPPB Certification Requirements Schedule A

- High School Diploma or GED
- 96 Contact hours in purchasing seminars/course
- 5 years total experience in which 3 years must be public procurement

# UNIVERSAL PUBLIC PROCUREMENT CERTIFICATION COUNCIL (UPPCC)

## Current CPPB Certification Requirements Schedule B

- Associates Degree
- 96 Contact hours in purchasing seminars/course
- 4 years total experience in which 3 years must be public procurement

# UNIVERSAL PUBLIC PROCUREMENT CERTIFICATION COUNCIL (UPPCC)

## Current CPPB Certification Requirements Schedule C

- Bachelor's Degree
- 48 Contact hours in purchasing seminars/course
- 2 years total experience in which 3 years must be public procurement

# UNIVERSAL PUBLIC PROCUREMENT CERTIFICATION COUNCIL (UPPCC)

## Current CPPB Certification Requirements Schedule D

- Advanced Degree (Master's or Ph.D.)
- 24 Contact hours in purchasing seminars/course
- 2 years of public procurement experience

# UNIVERSAL PUBLIC PROCUREMENT CERTIFICATION COUNCIL (UPPCC)

## 2014 CPPB Certification Requirements as of January 1, 2014

- Associate's Degree
- 3 Credit hours of public procurement coursework
  - OR 6 credit hours of procurement-related coursework
  - OR 56 Contact hours of "instructor-led" procurement training/education
- 3 total years of public procurement experience (within the previous 10 years)
  - OR 158 contact hours of instructor-led procurement training/education

# UNIVERSAL PUBLIC PROCUREMENT CERTIFICATION COUNCIL (UPPCC)

## Current CPPO Certification Requirements Schedule A

- Holder of CPPB Designation
- 144 Contact Hours in purchasing seminars/courses
- 8 years total experience in which 6 years must be in a public procurement and 3 years in a supervisory/management function

# UNIVERSAL PUBLIC PROCUREMENT CERTIFICATION COUNCIL (UPPCC)

## Current CPPO Certification Requirements Schedule B

- Bachelor's Degree
- 48 Contact hours in purchasing seminars/courses
- 3 years total experience in which 2 years must be in a public procurement supervisory/management function

# UNIVERSAL PUBLIC PROCUREMENT CERTIFICATION COUNCIL (UPPCC)

## Current CPPO Certification Requirements Schedule C

- Advanced Degree (Master's or Ph.D.)
- 24 Contact Hours in purchasing seminars/courses
- 3 years total experience in which 2 years must be in a public procurement supervisory/management function

# UNIVERSAL PUBLIC PROCUREMENT CERTIFICATION COUNCIL (UPPCC)

## 2014 CPPO Certification Requirements as of January 1, 2014

- Bachelor's Degree
- 3 Credit hours of public procurement coursework,
  - OR 6 credit hours of procurement-related coursework,
  - OR 72 Contact Hours of "instructor-led" procurement training/education
- 5 total years of public procurement experience of which a minimum of 3 years must be in a management or supervisory position (within the previous 10 years),
  - OR 174 contact hours of instructor-led procurement training/education

# UNIVERSAL PUBLIC PROCUREMENT CERTIFICATION COUNCIL (UPPCC)

Summary: Certification Deadline is through  
December 31, 2013, using 2013 requirements

Apply by 12/31/13 for the application  
to be evaluated under 2013 requirements  
with testing opportunities of  
May 2014 and October 2014

<http://www.uppcc.org/certified/newcertelig.aspx>



QUESTIONS & COMMENTS?