

## Agency Procurement Officers Meeting

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Date: December 12, 2016  
Time: 9:00 a.m. – 12:00 p.m. • Registration opens at 8:30 am  
Location: Walnut - Willow Conference Room • 4200 Surface Road

- |       |   |                |
|-------|---|----------------|
| I.    | Welcome & Introductions of New OPS Team Members | Kelly Sanders  |
| II.   | NextGen e-Procurement Update                    | Kelly Sanders  |
| III.  | Policy Updates                                  | Andrew Cochran |
| IV.   | OAKS – FIN Maintenance Update                   | James Yagodich |
| V.    | Non-IT Staff Augmentation                       | Kellie Johnson |
| VI.   | MBE Recruitment Task Force                      | Wayne McCulty  |
| VII.  | Community Rehabilitation Program                | Wayne McCulty  |
| VIII. | Recent Contract Awards & Upcoming Solicitations | Sandy Herrel   |
| IX.   | Introduction to <b>ALAS</b>                     | Sandy Herrel   |
| X.    | Open Discussion Forum                           |                |
| XI.   | Adjourn   |                |



# Agency Procurement Officer Meeting

December 12, 2016



**A+** - Agile

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



# Office of Procurement Services

## Welcome New Team Members

Joe Allen, Procurement Analyst – Fleet Team

Will Barr, Procurement Analyst – Medical Team

Mary-Catherine Brown, Standards Analyst – MRO Team

Shawn Carter, Standards Analyst – Fleet Team

Mike Eshelman, Standards Analyst – Food, Clothing, Office Team

Erica Mavis, Standards Analyst – Fleet Team

Adam Williamson, Standards Analyst – Food, Clothing, Office Team

Kevin White, Standards Analyst – Food, Clothing, Office Team





## NextGen eProcurement Update

Kelly Sanders





# Next Generation eProcurement

The journey so far...

- LEANOhio Kaizen events
- Central Program Discovery
- Competitive Dialogue
- Agency Discovery – General Sessions
- Agency Discovery – Follow-up Sessions
- Future-State Walkthrough
- RFP Development



# Next Gen Guiding Concepts

- Single Point of Entry
- Smart Routing
- Supplier Portal
- Open Marketplace
- Electronic workflow
- Dashboards
- Paperless
- Compliance
- Reporting



**Policy Updates**  
Andrew Cochran





# Purchasing Administrative Policy

- Replacement of GS-D-12 “Procurement Procedures for Supplies, Services and Information Technology”
  - Conversion to Ohio Administrative Policy PM-01 “Purchasing Procedures”
  - Format change
- Quoting threshold
  - Increase from \$500 to \$2,500
  - Solicit vs. obtain
- Agency review period: January, 2017



# Written Contracts Policy

- Origin: Procurement Thresholds Workgroup
  - Raise written contract threshold from \$500
- Development
  - Agency survey – August 2015
  - Agency review – February 2016
  - Respond to agency commenters – May 2016
  - Agency review – June/July 2016; November 2016
- Proposed thresholds
  - Goods: none; up to agency
  - Services: \$2,500 for certain account codes; others exempt
    - Account code review ongoing based on agency feedback



# Emergency Purchasing

- Identified gap: agency-specific situations
  - Do not meet ORC definition of “emergency”
  - Still a need for quick response
- Budget language submission
  - Developed with agencies operating their own facilities
  - “Emergency conditions”
  - Permits procurements in excess of ORC §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 as emergencies



# Veteran's Preference

- 5% preference
  - Bids and proposals
  - Does not compound with Buy Ohio
- Roles & responsibilities
  - Equal Opportunity Division: application & certification processes
  - Procurement offices (DAS and agencies): application of preference
- Currently in CSI process



## OAKS – FIN Maintenance Update

James Yagodich



# OAKS PUM 17 Update

- No “Process Changes”
- Main focus: Bug Fixes
  - 1,700 for Procurement
  - 500 for Asset Management



# OAKS PUM 17 Update

- Transaction Transparency
- Hyperlinks to supporting documentation



# OAKS PUM 17 Update

- Related Content
- Additional search fields
- Visual icons
- Online Help Updates





## **Non-IT Staff Augmentation**

**Kellie Johnson**





**GDC030-CSP900917**  
**Non-IT Staff**  
**Augmentation Services**



# **CURRENT STATE CONTRACTS**

## **Medical**

STS155-Allied Health Staffing (11 Contracts)

MAC107-Advanced Level Provider Staffing

LDC003-Allied Health Nurse Staff (DRC)

## **Non-Medical**

MAC022-Temporary Personnel Services

DEV001-(HEAP) Temporary Personnel Services



# STS155-Allied Health Staffing

Social Worker (BSW)	Certified Nursing Aide/Assistant	Occupational Therapist Assistant
Licensed Social Worker (LSW)	State Tested Nurse Aide (STNA General)	Respiratory Therapist
Social Worker (MSW)	Licensed Practical Nurse	Physical Therapist Assistant
Licensed Independent Social Worker (LISW)	Registered Nurse	Speech and Language Pathologist
Licensed Professional Counselor (LPC)	Medical Assistant	Speech and Language Therapist
Licensed Professional Clinical Counselor (LPCC)	Radiology Technologist	Occupational Therapist
Licensed Professional Clinical Counselor w/Supervision Designation (LPCC-S)	Ultrasound Technologist (Sonographer)	Physical Therapist
Licensed Chemical Dependency Counselor	Specialty Imaging Technologist (ARRT Cert.)	Medical Scheduler
Licensed Independent Chemical Dependency Counselor	Health Information Technician	Medical Secretary
Licensed Independent Chemical Dependency Counselor-Clinical Supervisor	Medical Technologist (ASCP Certified)	Medical Coder
Pharmacy Technician (Certified)	Nuclear Medicine Technologist	Medical Laboratory Technician
Phlebotomist	Paramedic Educator	Medical Laboratory Technologist
Dental Assistant	Diet Technician	Microbiologist
Dental Hygienist	Dietician	



# MAC107-ALP Staffing

Physician	Psychiatric Advanced Practice Nurse
Physician Administrator 2	Psychiatric Physician
Physician Administrator 2-Correctional	Psychiatrist
Physician Administrator 3	Psychiatrist On-Call Services
Physician Assistant	Psychiatrist-Mental Health
Physician Assistant-Mental Health	Psychiatrist-Telemedicine
Physician On-Call Services	Psychologist
Physician Resident	Psychologist Supervisor
Physician Specialist	Optometrist
Physician Specialist-Mental Health	Pharmacist
Physician-Telemedicine	Pharmacy Supervisor
Nurse Practitioner	Podiatrist
Nurse Practitioner Supervisor	



# LDC003-Allied Health Staffing

Health Information Technician
Health Information Technician (Medicaid)
Health Information Technician (Mental Health)
Licensed Practical Nurse (LPN)
Pharmacy Technician
Phlebotomist
Radiographer
Radiographer (Mammography-ORW Only)
Registered Nurse (RN)



# MAC022-Temporary Services

Account Clerk	Database Administrator	Maintenance Repair Worker
Accountant	Delivery Worker	Office Assistant
Accounts Payable Supervisor	Document Controller	Paralegal/Legal Assistant
Accounts Receivable Supervisor	Drafting Coordinator	Payroll Accountant
Administrative Assistant	Drafting Technician	Payroll Administrator
Administrative Professional	Epidemiology Investigation Project Manager	Sanitarian Program Administrator
Administrative Secretary	Epidemiology Investigation Supervisor	Sanitarian Program Specialist
Auditor	Epidemiology Investigator	Sanitarian Specialist Supervisor
Budget Analyst	Executive Secretary	Secretary
Business Analyst	Financial Analyst	Sr. Accountant
Clerk	Food Service Coordinator	Sr. Auditor
Computer Operator	Food Service Worker	Sr. Budget Analyst
Cook	Groundskeeper	Sr. Financial Analyst
Correctional Food Service Coordinator	Health Planning Administrator	Storekeeper
Correctional Food Service Manager	Human Services Program Administrator	Switchboard Operator
Cost Accountant	Human Services Program Consultant	Tax Accountant
Custodial Worker	Laborer	Truck Driver
Customer Service Assistant	Legal Secretary	Word Processing Specialist
Data Entry Operator	Mail Clerk/Messenger	



# DEV001-(HEAP) Temporary Personnel Services

Clerical Specialist 1

Clerical Specialist 2

Clerical Specialist 3

On-Site Supervisor 1

On-Site Supervisor 2

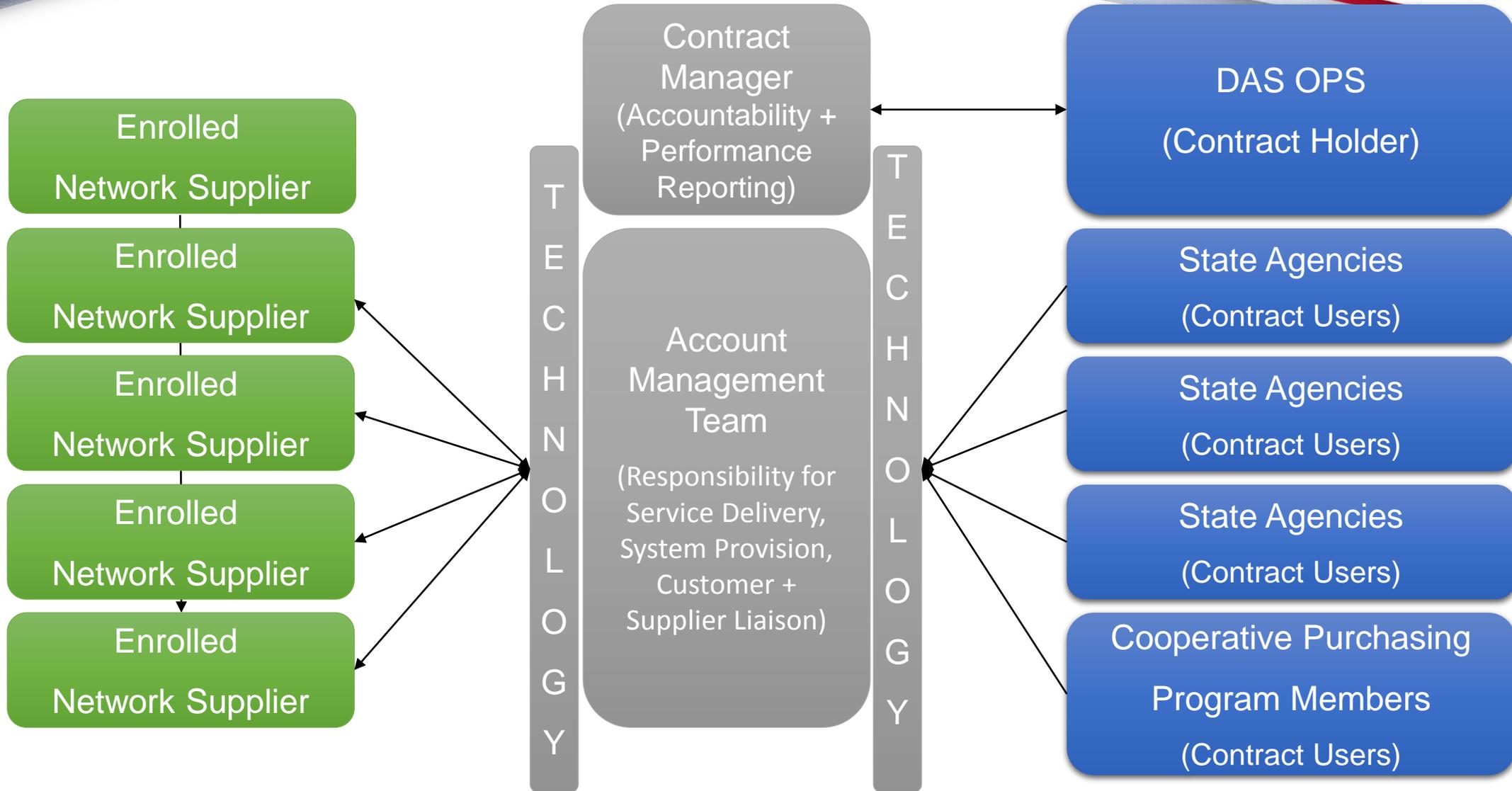


# Administrative Positions

Not Currently on Contract

Technical Writers	General Administrative Hearing Officer
Facilitators	Professional Conduct Hearing Officer
Technical Advisory Committee	IDEA Special Education Mediator
Quality Evaluator for Charter School	Field Observer - MSP
Parent Mentor	Grant Reader
State Diagnostic Reviewer	Item Reviewer - MSP
	Grant Reader 2 – MSP

Personal services contracts-Administered by Agencies



KEY: Grey is the MSP , Green is the Resource Provider, Blue is the State (Agencies)



# ESTIMATED TIMELINE

Oct-Dec 2016	Implementation Period Phase 1 Contracts
	STS-155 Positions, Non-Contract Admin positions
December 18	First week Go Live-PO's to InGenesis
January 2017	Add any new positions, begin onboarding PS contracts
February 28, 2017	Go Live for FieldGlass Tool
Jan-June 30, 2017	Implementation Period Phase 2 Contracts
	DEV001, LDC003, DRC008
	MAC022 & MAC107 Positions
JULY 1-2017	Implementation Completion Date



## **MBE Recruitment Task Force**

Wayne McCulty





# *MBE Recruitment Task Force*

- The MBE program currently has 1,298 certified companies.  
~ The number of certified MBEs that state agencies spent with in FY2016 was 316.
- The largest challenge of increasing business with MBE suppliers is finding MBEs where there is the largest need.
- The number of potential MBE suppliers in Ohio has been touted as being as high as 20,000.
- **The Mission for the Task Force: Formulate a solid list of potential MBE suppliers who are currently not certified; gather information on their capability/capacity/customer base/etc.; match potential capabilities with State needs; prioritize a list; conduct supplier assessments; certify additional MBEs.**



# *MBE Recruitment Task Force Team Representatives*

- DAS OPS (leading the Team)
- EOD
- DSA
- OBM
- OIT
- Secretary of State
- A current MBE supplier



## *MBE Recruitment Task Force Steps*

1. Develop a solid list of potential MBE suppliers
2. Create and prioritize agency needs for State contract products and services
3. Match capabilities with needs
4. Visit, interview, assess capabilities
5. Certify additional suppliers



# *MBE Recruitment Task Force*

## *Current Status*

- Have identified 2600 potential suppliers
- EOD has an additional 700 MBEs that are currently performing work for local entities
  - ~ They have a process to cross-certify with current State requirements
- Additional EOD MBE Certification Officers are being cross-trained from the EDGE team.
- 78 new suppliers were added in the first quarter of this fiscal year, and that number should increase as additional officers are trained, and more visits are conducted.



## *MBE Recruitment Task Force Vision*

- By the end of this fiscal year, and beyond, the team will work together to continue to add more, and more capable MBE sources to assist all agencies in competitively meeting their MBE set aside goals.



# *Contacts for MBE Procurement Information*

Wayne McCulty, Deputy Chief Procurement Officer  
614-466-7066

Tonya Prickett, Procurement Manager  
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4200 Surface Road  
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# *Questions?*





## Community Rehabilitation Program

Wayne McCulty





# *CRP Strategic Plan*

The Office of Procurement for the  
Community Rehabilitation Program  
(OPCRP)



***CRP Strategic Planning Steering  
Committee***



# Strategic Planning Steps

- Establish Strategic Planning Team
- Determine Core Values
- Establish a Mission Statement
- Create a Vision Statement
- Visualize where you want the organization to be in 5 years
- Analyze where the organization is today (SWOT analysis)
- What are the gaps between today and future image?
- Develop Initiatives from those gap elements
- Establish goals and objectives from the initiatives
- Prioritize the goals
- Develop a schedule to complete the goals with timelines.
- Assign goals to teams for execution and completion
- The Strategic Planning Team continues to meet quarterly to monitor and track goal progress and make any necessary adjustments
- When 5 year plan is achieved – develop another 5 year plan by starting again.



# Committee Original Members

Monty Kerr representing DODD – [Monty.Kerr@dodd.ohio.gov](mailto:Monty.Kerr@dodd.ohio.gov)

Doug Bailey representing ODMH - [Doug.Bailey@mh.ohio.gov](mailto:Doug.Bailey@mh.ohio.gov)

Rose Reed representing RSC - [Rose.Reed@rsc.ohio.gov](mailto:Rose.Reed@rsc.ohio.gov)

Tim Brunney representing ODOT - [Timothy.Brunney@dot.state.oh.us](mailto:Timothy.Brunney@dot.state.oh.us)

Judy Debevoise, Licking/Knox Goodwill - [JDebevoise@goodwillnewark.com](mailto:JDebevoise@goodwillnewark.com)

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Deborah Capuano, Greene, Inc. - [DCapuano@greeneinc.org](mailto:DCapuano@greeneinc.org)

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Bob Comben, VGS, Inc. – [BobComben@vgsjob.org](mailto:BobComben@vgsjob.org)



# Mission and Vision

## **Mission Statement:**

*To enhance opportunities for people with disabilities thru the Procurement Community Rehabilitation Program enabling them to provide quality products and services that exceed customer expectations.*

## **Vision Statement:**

*Utilizing the talents of people with disabilities to provide preferred customer solutions.*



# Key Initiatives & Teams

Key Initiatives & Team Responsibility	
<u>Key Initiative</u>	<u>Responsible Team</u>
1. Increase job opportunities for People with Disabilities through the expansion of the state and local government base ~ Expand Products & Services ~ Orientations; Trade Shows; Presentations; Information/Training Sessions	DAS Team Team Lead – Wayne McCulty
2. Develop CRP business acumen/capabilities so they can become a more viable business ~ Financial; Accounting; Marketing; Operational Functions of an Organization	Ohio Alliance Team Team Lead – John Mitchell
3. Marketing (developing a campaign for) the CRP program to state customers ~ Branding; Logo; Advertising	Agency Team Team Lead - Tim Brunney (ODOT)
4. Communication within the CRP Community, to Agency Customers, and State Government ~ Gaining Government Support, as a Priority ~ Promote Program Expansion ~ Newsletter; Listserv; web-site; Communication among CRPs	CRP Team Team Lead - Judy DeBevoise



# CRP Strategic Plan Results

- Expansion of products:
  - ~ Call center services; toner cartridges; post-it notes
- Outreach events expanded
- Comprehensive Business Acumen Standards created and provided to CRP suppliers with a capability self assessment and needs analysis
- Strong program support through the DAS Director's Office
- Expanding program to political subdivisions and State institutions



# Going Forward

- Initiative Teams currently working on new/expanded goals for 2017.
- Team working with OOD and DODD regarding federal changes that will impact some CRP suppliers, so we can assist.
- Expanded opportunities, improved service quality, and creating self-reliant successful business entities (who just happen to be CRP suppliers) is the continued vision for the program.



# Contacts

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# *Questions?*





## Recent Contract Awards & Upcoming Solicitations

Sandy Herrel





# Recent Contract Awards & Upcoming Solicitations

- Contract Awards Quarters 1 & 2 FY17 YTD
- [Link to Recent Contract Awards](#)
  
- Planned OPS Worklist Quarters 3 & 4 FY17
- [Link to Worklist](#)



## Introduction to **A+LAS**

Sandy Herrel





## Atlas: Navigating the Roadmap to A+ Service, Support, and Solutions

Welcome to our first edition of Atlas! Thank you for reading! Our goal in producing this newsletter is to keep you informed & involved. Since we want the newsletter to be as relevant as possible to your procurement needs, we look forward to hearing your comments on this first issue. Have a question? Have a suggestion? Want to send a submission for an upcoming issue? Simply email Teri Purr ([teri.purr@das.ohio.gov](mailto:teri.purr@das.ohio.gov)), & keep an eye on this space!

### DAS Vehicle Contract Updates

#### GDC104 / Automobiles:

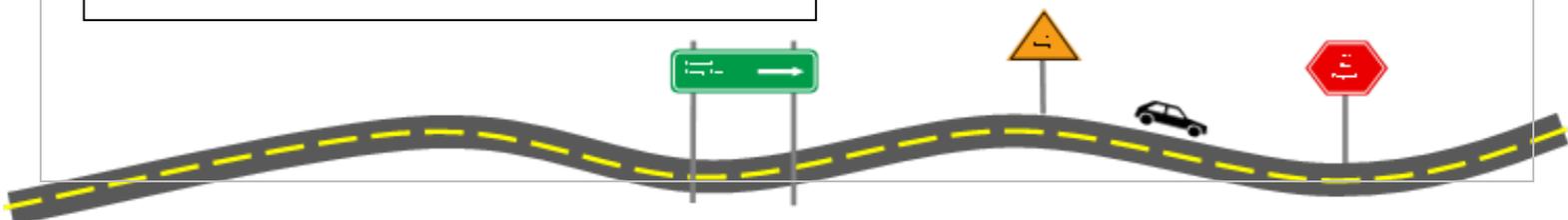
New Model Year 2017 Automobiles and Passenger Vans (GDC104/RS900817) - DAS awarded the contract, effective 11/15/16. The award includes compact and midsize sedans, compact vans and 8, 12 and 15-passenger full sized vans. Vehicle awards also include a wide range of available options as well as delivery and titling. Two MBE dealers, Bob Ross Buick, Inc. and Middletown Ford, Inc. received the awards. Using agencies will receive full MBE credit for procurements from this contract.

#### GDC093 / Trucks & Utility Vehicles:

New Model Year 2017 Trucks and Cargo Vans (GDC093/RS901017 and RS901117) - Bids were received on 12/7/16 for the open market portion of the requirement and are in the evaluation phase. Bids for the MBE portion will open 12/28/16. **The open portion of the contract will include compact, midsize full size sport utility vehicles and 2 and 4 wheel drive cab and chassis trucks. The MBE portion of the contract will be for 30 of the 42 total vehicles, including cargo vans, pickup trucks and a portion of the cab and chassis trucks.** Awards for both bids will be combined into one master GDC093 contract.

### Managed Services Provider for Non-IT Staff Augmentation Services

DAS Awarded the new contract for a managed services provider for all non-IT staff augmentation, effective 10/25/16. The awarded Contractor, InGenesis, Inc., will serve as the single point of contact for all agency and participating cooperative NON-IT staffing needs. InGenesis has begun the process of on-boarding the individual State Term Schedule and State Term Contract contractors as well as training for the state agencies. The contract will be implemented in 2 phases, as existing DAS contracts expire with a target completion date of 7/1/16.



AGENCY NAME	INDEX	ANALYST E-MAIL	PHONE (614)
Adjutant General	ADJ	Geraldine Berry geraldine.berry@das.ohio.gov	644-1790
Administrative Services	DAS	Carol Clingman carol.clingman@das.ohio.gov	752-0032
Aging	AGE	Erica Mavis Erica.mavis@das.ohio.gov	466-8928
Agriculture	AGR	Mary-Catherine Brown Mary-catherine.brown@das.ohio.gov	466-2939
Attorney General	AGO	Nicole Erb nicole.erb@das.ohio.gov	466-3461
Auditor	AUD	Peggy Canada peggy.canada@das.ohio.gov	644-1786
Board of Regents	BOR	Jennifer Dammeyer jennifer.dammeyer@das.ohio.gov	644-6762
Budget and Management	OBM	Joe Allen joe.allen@das.ohio.gov	752-0370
Commerce	COM	Adam Williamson adam.williamson@das.ohio.gov	466-6746
Department of Medicaid	MCD	Medical Team	466-2282
Development Services Agency	DSA	Jennifer Dammeyer jennifer.dammeyer@das.ohio.gov	644-6762
Developmental Disabilities Department	DDD	Kristen Johnson kristen.johnson@das.ohio.gov	387-0065
Department of Education	EDU	Therese Gallego therese.gallego@das.ohio.gov	644-9814
Environmental Protection Agency	EPA	Geraldine Berry geraldine.berry@das.ohio.gov	644-1790
Expo Center	EXP	Mike Eshelman Mike.eshelman@das.ohio.gov	466-6741
Governor	GOV	Nicole Erb nicole.erb@das.ohio.gov	466-3461
Health	DOH	Ross Leider ross.leider@das.ohio.gov	644-1807
Insurance	INS	Patrick Means patrick.means@das.ohio.gov	644-1788
Job and Family Services	JFS	Ross Leider ross.leider@das.ohio.gov	644-1807
Lottery	LOT	Joe Allen joe.allen@das.ohio.gov	752-0370
Mental Health and Addiction Services	DMHAS	Medical Team	466-2282
Natural Resources	DNR	Terry Spiropoulos terry.spiropoulos@das.ohio.gov	644-6764
Opportunities for Ohioans with Disabilities	OOD	Medical Team	466-2282
Public Safety/BMV/EMA/DHP	DPS	Karen Murphy karen.murphy@das.ohio.gov	466-5172
Racing Commission	SRC	Peggy Canada peggy.canada@das.ohio.gov	644-1786
Rehabilitation and Correction	DRC	Dennis Kapenga dennis.kapenga@das.ohio.gov	466-7911
School for the Deaf/School for the Blind	OSD/OSB	Shawn Carter shawn.carter@das.ohio.gov	466-0539
State Library of Ohio	LIB	Erica Mavis Erica.mavis@das.ohio.gov	466-8928
Taxation	TAX	Food Team	466-4362
Transportation	DOT	Terri Villavicencio terri.villavicencio@das.ohio.gov	728-8590
Veterans Services	DVS	Walt Schneider walter.schneider@das.ohio.gov	644-5151
Workers' Compensation	BWC	Patrick Means patrick.means@das.ohio.gov	644-1788
Youth Services	DYS	Kristen Johnson kristen.johnson@das.ohio.gov	387-0065