

WELCOME!

Agency Procurement Officer Meeting

December 7, 2015

Agency Procurement Officers' (APO) Meeting

Date: December 7, 2015
Time: 1:00 pm – 4:00 pm (Registration opens at 12:30 pm)
Location: General Services Division
4200 Surface Road
Walnut/Willow Conference Room

Agenda:

Welcome	Director Blair
Procurement Services Re-Organization	Kelly Sanders
Role of the APO	Kelly Sanders
Procurement Reform Workgroup Updates	Andrew Cochran
eProcurement	Kelly Sanders Bob Sievert
Requisite Review Process	Kelly Sanders David Colopy
RTP Dashboard	Wayne McCulty Kellie Johnson Dante Talley
Contract Spotlights	GDC024 Translation Services – Therese Gallego and VocaLink MAC107 Advanced Level Provider Temporary Staffing – Kellie Johnson CRP Printing Services – Wayne McCulty and Shavonna Neal
Open Discussion Forum	

Guiding Principles = A+ Service

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



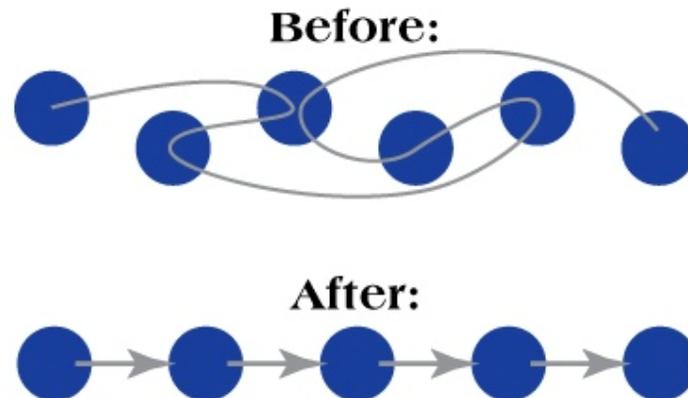
AGILE

Move quickly and easily



STREAMLINED

Smooth-running and looking for simpler working methods



EFFECTIVE

Accomplish a purpose and produce the expected results



RESPONSIVE

React quickly and positively



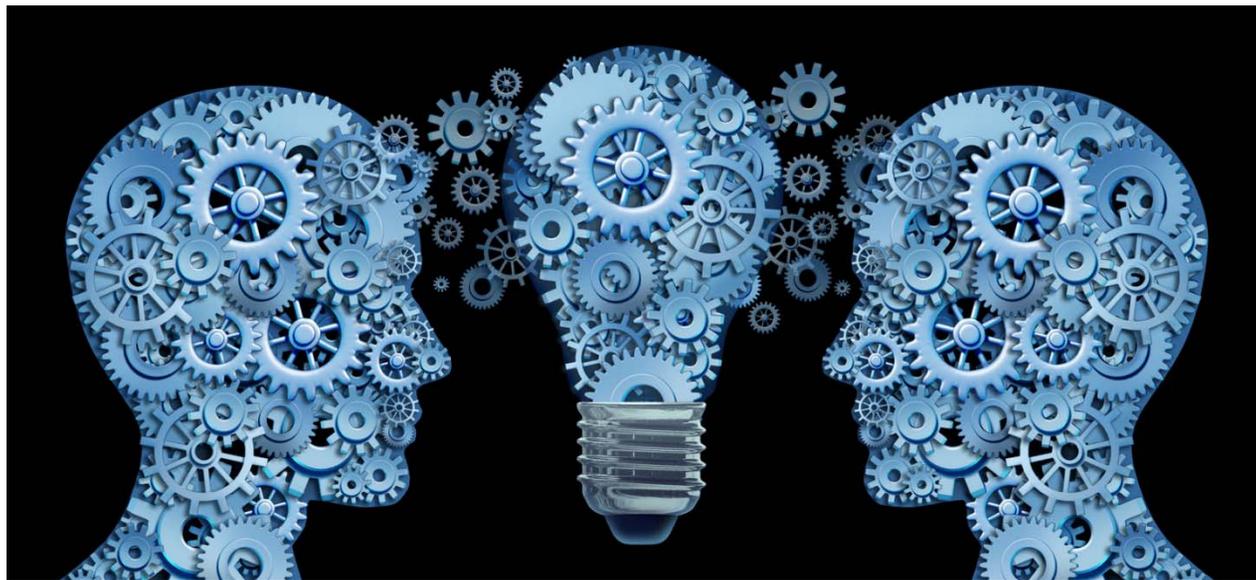
VALUE-BASED

Quality, cost-effective solutions



INNOVATIVE

Introduce new ideas and methods



CUSTOMER-FOCUSED

Take time to understand and address customer needs



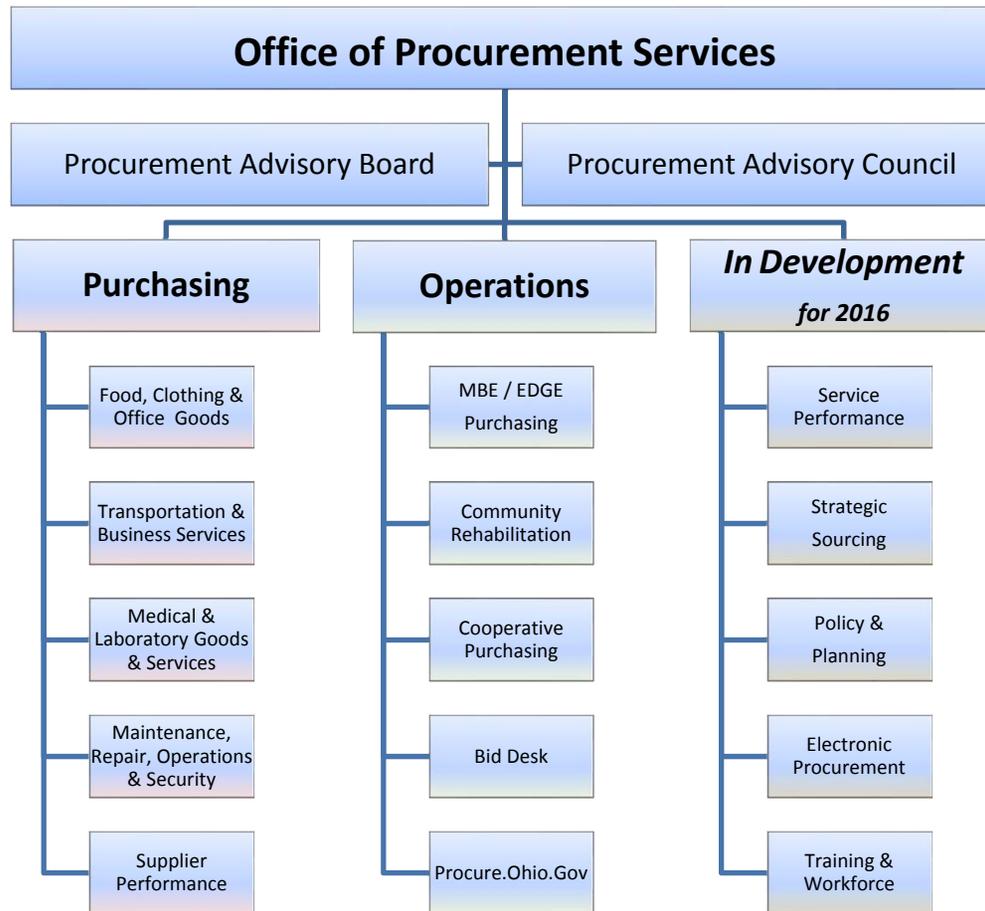
ETHICAL

Act in an equitable and fair manner while maintaining high standards of conduct





Service-Based Re-Organization



Role of the APO – Executive Order

4. **Duties of the OCPO and State Agency Procurement Officers.** The OCPO and Agency Procurement Officers will also be responsible for ensuring that the State is undertaking procurement best practices by:
 - a. Creating a center-led supply organization across state government;
 - b. Maximizing state government’s purchasing power by leveraging its spending;
 - c. Applying a consistent strategic sourcing process that will allow the State to standardize its purchasing process in order to obtain the best prices for services and supplies;
 - d. Attracting, developing, and retaining a talented corps of supply management professionals;
 - e. Setting annual targets to determine whether the State is making progress towards its procurement performance goals by reporting results and applying a strict and consistent process for determining real cost savings;
 - f. Maximizing use of information technology for procurement to reduce processing time, reduce transactional cost and increase supplier leverage;
 - g. Implementing, to the extent possible, the detailed best practices recommendations of the Advantage Ohio Procurement Reform Working Group analyzing our state procurement practices; and
 - h. Accomplishing the above objectives without compromising product quality, customer service, or supplier diversity objectives.

Role of the APO – Executive Order

5. **Additional Responsibilities of Agency Procurement Officers.** In addition to the foregoing responsibilities, State Agency Procurement Officers will also be responsible for:
- a. serving as the entity's procurement contact;
 - b. communicating needs for supplies and services to the state Chief Procurement Officer;
 - c. ensuring that procurement personnel are properly certified and trained;
 - d. maximizing competition and minimizing waivers of competitive selection;
 - e. implementing the "Think Ohio First" procurement practices described in Paragraph Seven of this Order;
 - f. coordinating with the Chief Ethics Officers to ensure that all contracts are awarded according to applicable Ohio ethics laws and Executive Order 2007-01S;
 - g. paying vendors promptly and taking advantage of prompt payment discounts;
 - h. disseminating best practice information to individuals involved in procurement; and
 - i. producing and verifying data and reports as requested.

Role of the APO – Strategic Focus

- Collaboration, participation and feedback
- Planning and analysis support
- Communication = increase value and service
 - Determination & Recommendation process
 - Surveys
 - Complaint to Vendor

Procurement Reform Workgroup Updates



Training Workgroup

- > *Purchasing and Payment Processes in the State of Ohio*
 - > In myOhio: Career Resources > All Learning (ELM) > Search ELM Catalog > Enter keyword: DAS-PR-101
- > Usage & feedback
 - > More than 140 students
 - > 24 agencies



Training Workgroup

- > Future Efforts
 - > Supplier training
 - > Certification program
 - > Procurement handbook



Templates Workgroup

- > Goal
 - > Standard templates for categories of goods and services
 - > Standard templates: benefits
- > Benchmarking
- > General goods and services
 - > [Template and Guidance Document](#)
- > Information technology
 - > STS purchases – volunteers to test are needed
 - > Direct purchasing



Thresholds Workgroup

> Thresholds set in statute, policy, and practice

Threshold	Recommendation	Disposition
Controlling Board	Raise to \$100K along with compensating controls	Not able to move forward
Direct Purchase	Raise to \$100K along with compensating controls	Not able to move forward
Quoting	Eliminate conflicting guidance; raise quoting threshold	Conflicting guidance eliminated; threshold to be raised to \$2500
Contracts	Raise written contract threshold from \$500	Written contracts policy in development
Pcard	Raise transaction limit from \$2500	Will be raised with OAKS FIN 9.2



Portal Workgroup

- > Requirements-driven redesign
- > Project phases
 - > Phase 1
 - > Phase 2
- > Site demo
- > Questions and comments
 - > <http://procure.ohio.gov/proc/submitCommentsQuestions.asp>



Final Thoughts

- > Thank you!
- > Moving forward...
 - > Workgroups → Advisory Council

eProcurement

eProcurement Goals

- Purchase Transparency and Accountability
- Increase Competition & Reduce Prices
- Leverage Buying Power
- Increase Administrative Efficiency
- Expand Ohio Small Business Opportunities
- Reduce Duplicate Systems & Operating Costs
- Expand Local and Federal Government and Higher Education Participation

Requisite Review Process

- ORC 125.035
- OAC 123:5-1-17
- Purchases \geq \$25,000
- Exemptions
 - State Term Contract Purchases
 - Blanket Release and Permit Purchases
- Request to Purchase (RTP) initiates review

RTP Dashboard

Contract Spotlights

- GDC024 - Translation Services
- MAC107 - ALP Temporary Staffing
- CRP Printing Services
- GDC160 – TPA Facility Maintenance, Repair and Minor Construction Projects

Open Discussion Forum