

**WELCOME!**

# **Agency Procurement Officer Meeting**

**December 7, 2015**

# Guiding Principles = A+ Service

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



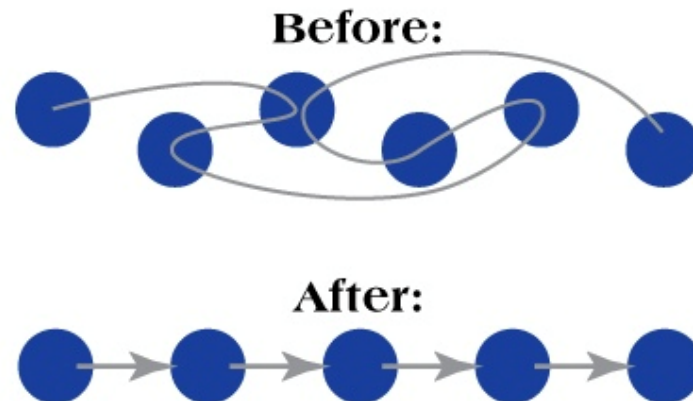
# AGILE

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



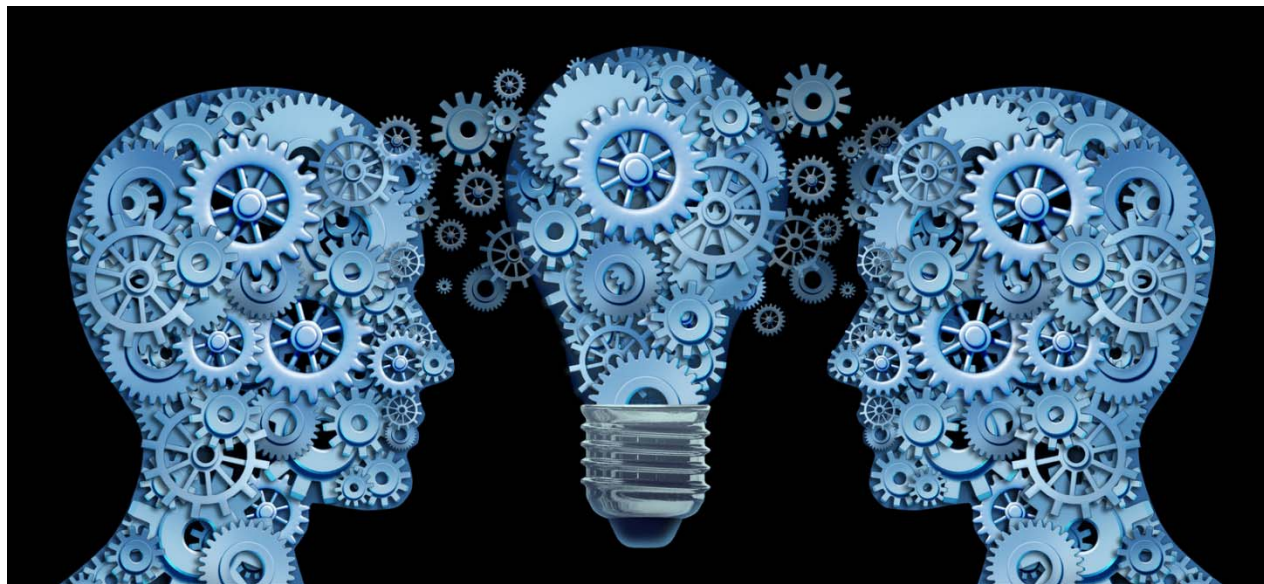
# VALUE-BASED

Quality, cost-effective solutions



# INNOVATIVE

Introduce new ideas and methods





# CUSTOMER-FOCUSED

Take time to understand and address customer needs



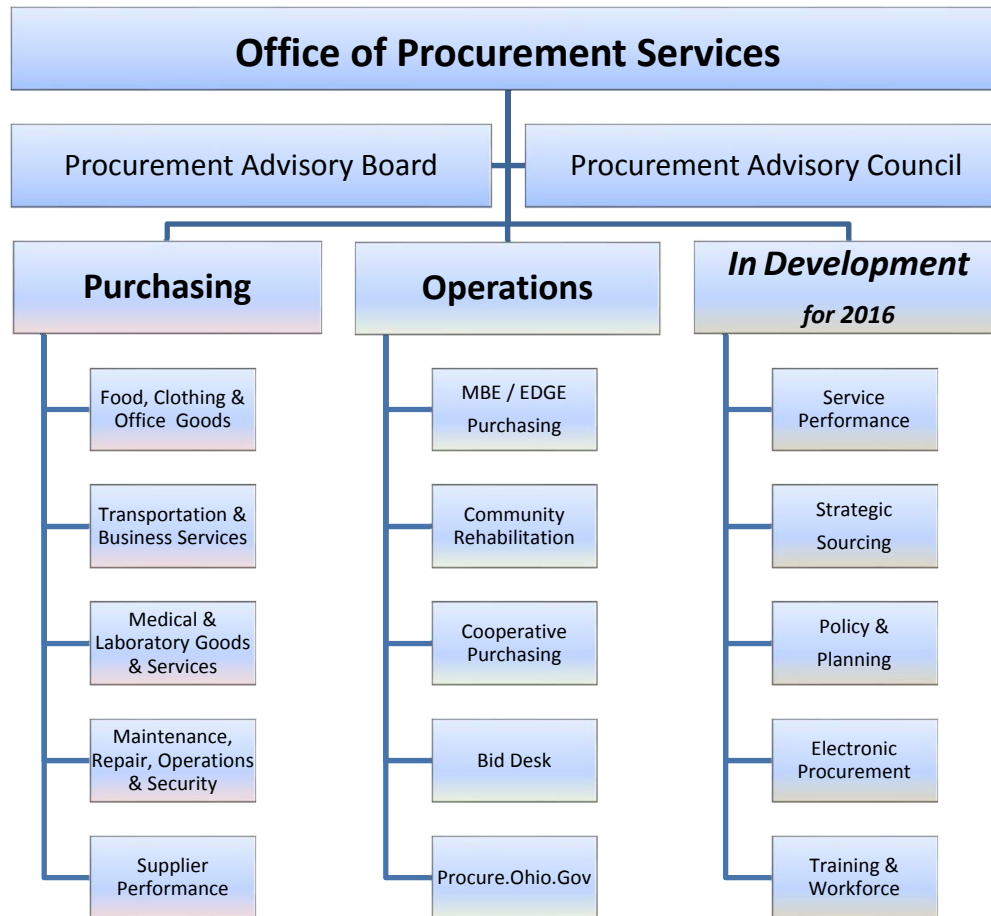
# ETHICAL

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

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- > *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

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



# Templates Workgroup

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- > 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

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> 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

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



## Final Thoughts

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- > 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