

Welcome!



<http://procure.ohio.gov/PDF/SPUG/SPUG.HTM>

Some Important Notes...

If you have **QUESTIONS** for today's presenters:

Live audience: Please raise your hand, and staff will bring a microphone to you.

Webinar audience: E-mail questions to shavonna.neal@das.ohio.gov. Please indicate "**SPUG Question**" in the subject line. E-mailed questions will be read aloud and presenters will have an opportunity to respond. Any questions that we do not have time to respond to will be posted on the SPUG Web site for viewing after today's event.

Today's Agenda

- **Welcome, Agenda Overview, Staff Announcements**
- **World Energy Solutions Inc. Contract Update**
- **Vehicle Contract Update**
- **MBE Updates**
- **MBE Program: Sharing Best Practices**
- **MBE Set Asides under the State Term Schedule (STS) Program**
- **Ohio Marketplace Update**

Office of Procurement Services Staff Announcements



CONGRATULATIONS!!!

Staff Announcements

Jennifer Shaefer

Procurement Analyst

MRO Team



Staff Announcements

Alice Ewing
Contract Analyst

Fleet Team



Next on the Agenda...

World Energy Solutions, Inc. Contract Update

Tony Barnhart
Vice President, Retail Energy Sales

DAS010 TPA - Electric Aggregation



December 3, 2013



WorldEnergy



Announcing the

State of Ohio Electricity Aggregation

Managed by:

Ohio Department of Administrative Services

The Ohio Department of Administrative Services (DAS) provides state agencies with programs to reduce costs in the most effective manner possible. With the advent of a competitive electric market, DAS has established an electricity sourcing aggregation to help state agencies reduce their costs associated with their electric energy needs as well as meeting the state goals of reduced consumption for the years to come.

DAS has engaged World Energy Solutions, Inc. (World Energy) to serve as the third-party administrator of the electricity aggregation. World Energy was recently selected through a competitive procurement process (RFP No.: CSP904713, Index No.: DAS010, Third-Party Administrator – Electric Aggregation). The third-party administrator will be responsible for the development and management of an electric aggregation program to provide a reliable electric supply, maximize cost savings and expand the program in both volume and the number of accounts.

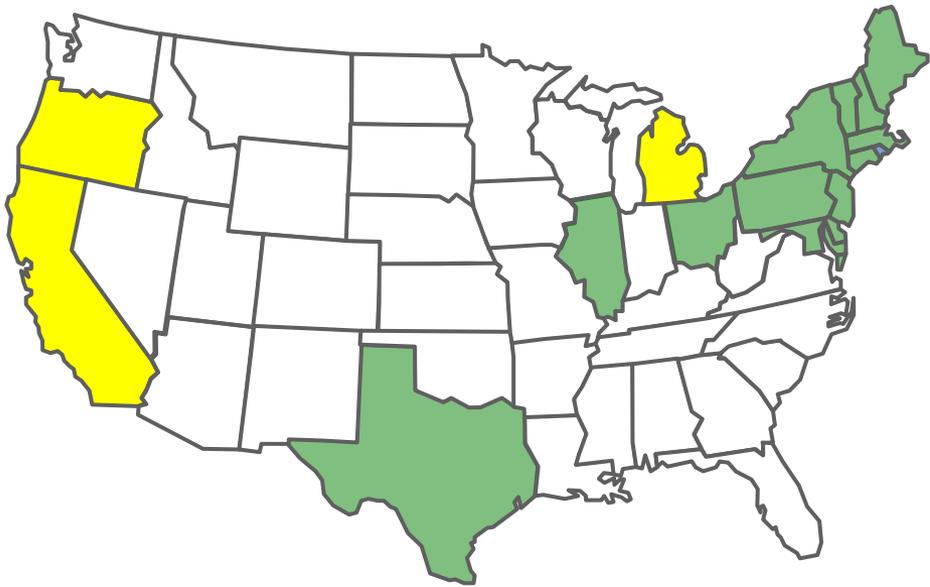
In the coming weeks, World Energy, on behalf of DAS, will be reaching out to eligible state agencies regarding the electricity aggregation. The current timeline is working toward a reverse energy auction in October 2013. In the meantime, if you have any questions, please contact:

Geraldine Berry
Ohio Department of Administrative Services
General Services Division
Office of Procurement Services
4200 Surface Road
Columbus, OH 43228
Business: 614.466.1790
E-mail: geraldine.berry@das.ohio.gov

Tony Barnhart
World Energy Solutions, Inc.
6500 Emerald Parkway
Suite 385
Dublin, OH 43016
Business: 614.553.6713
Mobile: 614.581.8802
E-mail: tbarnhart@worldenergy.com

World Energy at a Glance

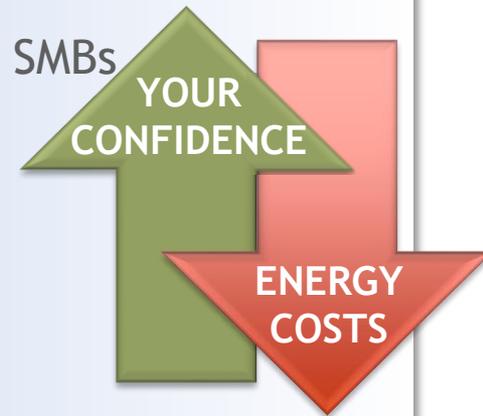
Electricity Deregulation



- Formed at the Dawn of Electricity Deregulation and B2B eCommerce
 - 40+ V-C funded competitors
 - 1,000 brokers
 - Public in 2006
- What We Do
 - Lower our customers' total energy costs
 - Operate industry's leading on-line auction platform

World Energy by the Numbers

- \$40B+** Electricity, Natural Gas, and Green Credit Transactions
- \$2B+** Value created for our clients
- 5,000+** Clients...20 of Fortune 100, +80 utilities, 3,000+ SMBs
- 40,000+** Pricing Events Run
- 7-10%** Typical Customer Savings
- 500+** Registered Suppliers
- 295** Channel Partners
- 1st** Carbon cap and trade auction administered in U.S. history



World-Class Customer Base

BUSINESS



UTILITIES



GOVERNMENT



INSTITUTIONS



Ohio Customer Base

BUSINESS

AK Steel, Campbell Soup, Del Monte, Dow Corning, Guardian, Pfizer, Proctor & Gamble, Sealy, Smuckers, Snap-On, US Foods, Wasau Paper, Whirlpool

UTILITIES

Columbia Gas of OH
Vectren
Dominion East OH

GOVERNMENT

GSA, State of OH Dept of Trans, Aurora, Canton, Euclid, Findlay, Huron, Martin's Ferry, Massilon, Rocky River, Stow, Toronto, Twinsburg, Uhrichsville

INSTITUTIONS

OSU, Ashland, Cleveland St, Franciscan, OH Dominican, Shawnee St, Univ of Toledo, Yeshiva, Catholic Health Partners, Nationwide Children's

Ohio Customer Base

BUSINESS

AK Steel, Campbell Soup, Del Monte, Pfizer, Smucker, Vantage

GSA, Aurora, Huron, Rocky River, Stow, Toronto, Twinsburg, Uhrichsville

UTILITIES

Columbian Gas of OH

West, Columbus, Toledo, Reshiva, Catholic Health Partners, Nationwide Children's

539 Customers
6,000 Accounts
4.5M mWh
68 bcf

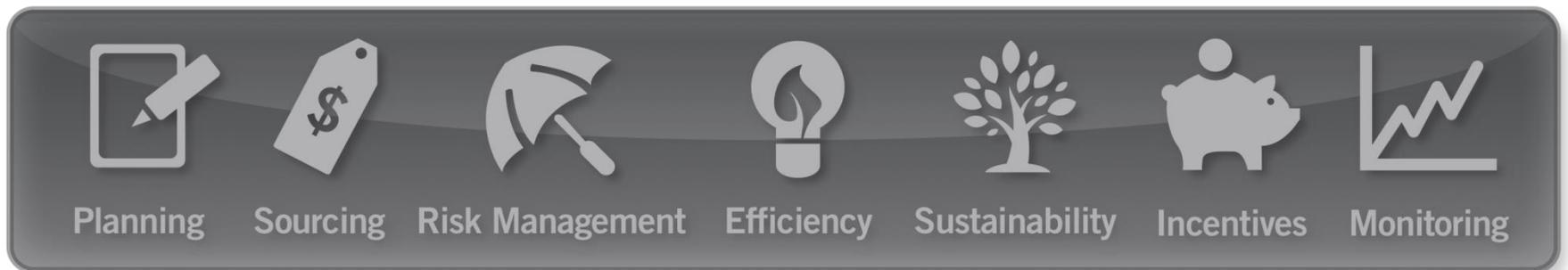
Energy Has Gotten Complicated



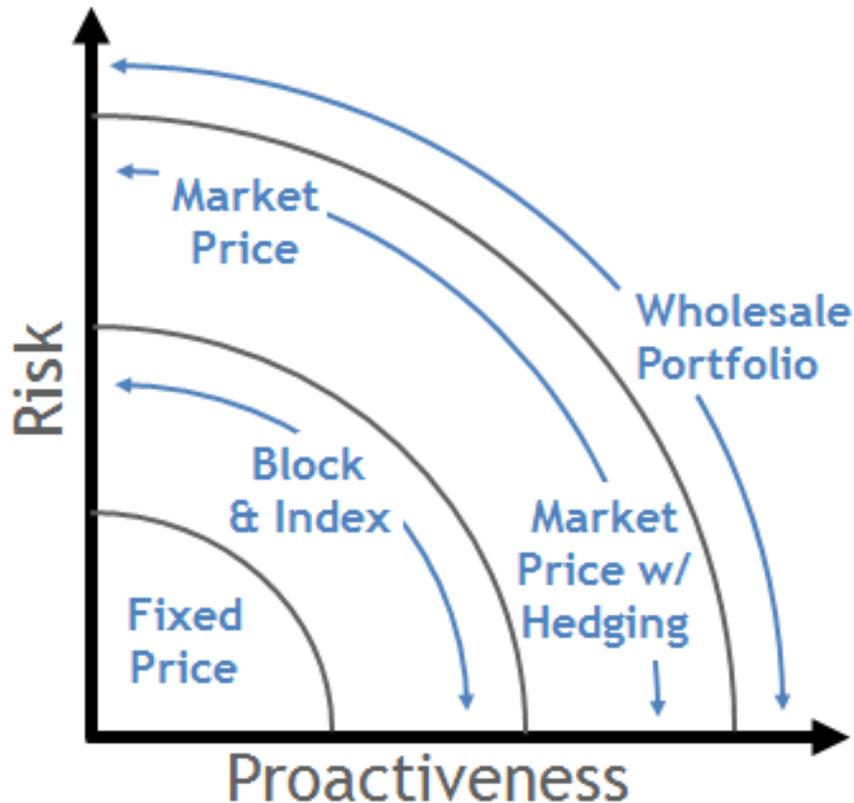
Unique Perspective

$$\boxed{\text{E}} = \boxed{\text{P}} \times \boxed{\text{Q}} - \boxed{\text{i}}$$

ENERGY COST = PRICE x QUANTITY - INCENTIVE



Procurement Strategy Factors



- Retail Structures
 - Firm Fixed Price
 - Market Price (Day Ahead)
 - Block and Index
 - Market Price with Hedging
- Wholesale Structures
 - Wholesale Portfolio
- Market Dynamics
- Certain pricing products support different strategies
- Some strategies employ multiple pricing products

- Supplier Liquidity
- Anglo-Dutch Design
- RFP Architecting and Sequencing
- Pristine Process
- Unparalleled Expertise

Supplier Liquidity

Auction Information

[Printable View](#)

Auction Start Time: 5/25/2010 10:30:00 AM EPT
 Auction End Time: 5/25/2010 11:30:00 AM EPT
 Total Quantity (Annual): 32,514,092 kWh
 Opening Bid (\$/kWh): 0.08000
 Reserve Price (\$/kWh): N/A
 Reserve Status: N/A

RFP Status: **Closed: Not Awarded**
 Time Left: **Auction Ended**
 Total Bids: 25 Unique Bidders: 10
 Low Bid (\$/kWh): 0.06350
 Low Bidder: **Exelon Energy Company**

10 Bidders,
25 bids

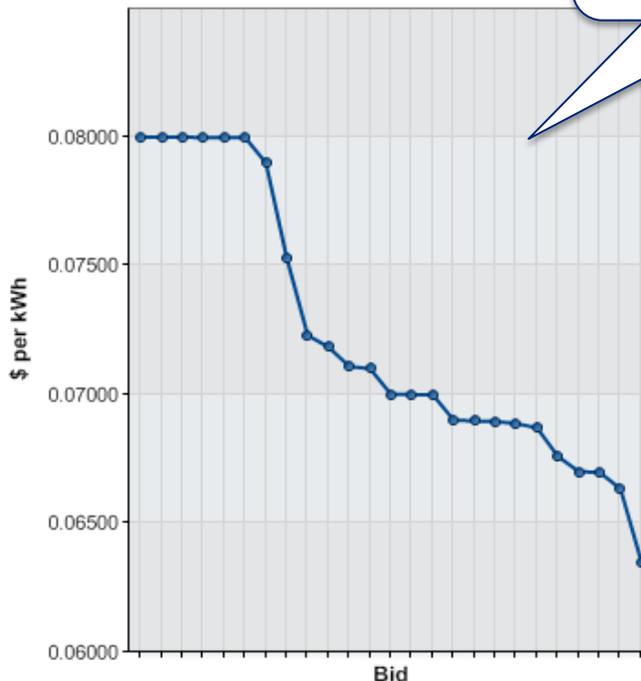
Auction Generated Savings

First Bid (\$/kWh): 0.07999
 Best Bid (\$/kWh): 0.06350
 Your Total Quantity: 32,514,092 kWh
 Cost - First Bid: \$2,600,802.22
 Cost - Best Bid: \$2,064,644.84
 Total Auction Generated Savings :
\$536,157.38 or 20.62 %

Market Benchmark Savings

Price-to-Compare (\$/kWh): 0.07329
 Best Bid (\$/kWh): 0.06350
 Your Total Quantity: 32,514,092 kWh
 Cost - Price-to-Compare: \$2,382,957.80
 Cost - Best Bid: \$2,064,644.84
 Total Market Benchmark Savings :
\$318,312.96 or 13.36 %

Price Graph



Anglo-Dutch Design

Auction Generated Margin

First Bid (%): **60.00000**
 Best Bid (%): **93.50000**
 Your Total Quantity: **8.00 MW**
 Revenue - First Bid: **\$498,144.00**
 Revenue - Best Bid: **\$776,274.40**

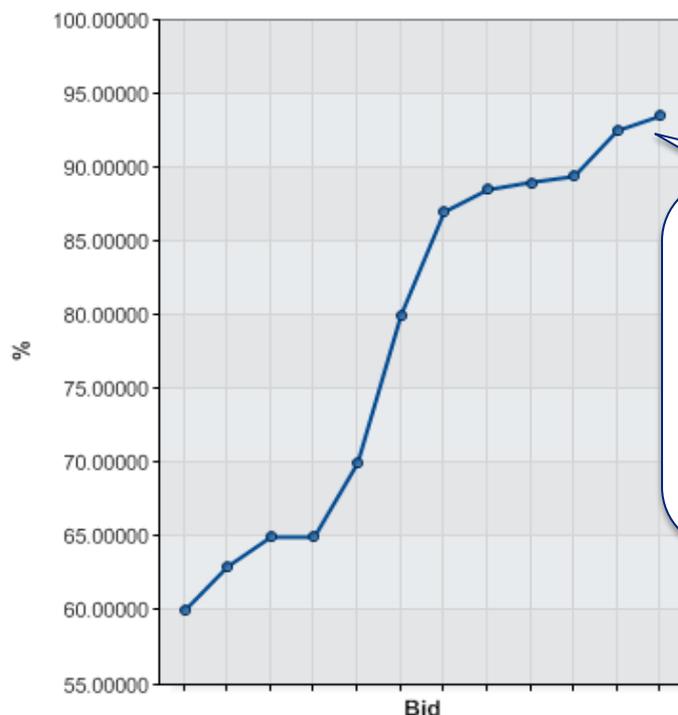
Total Auction Generated Margin :
\$278,130.40 or 35.83 %

Market Benchmark Margin

Price-to-Compare (%): **70.00000**
 Best Bid (%): **93.50000**
 Your Total Quantity: **8.00 MW**
 Revenue - Price-to-Compare: **\$581,168.00**
 Revenue - Best Bid: **\$776,274.40**

Total Market Benchmark Margin :
\$195,106.40 or 25.13 %

Price Graph



**Last Bid
Blind
Delivers
Best Price**

*Calculation uses WE Curtailment Index Estimate of 103,780.00000(\$/MW)

Bid History (View: All Bids | [High Bid Only](#))

Total Bids in View: **12**

Company Name	Contact Name	Bid Amount	Date and Time of Bid	Action
Viridity Energy, Inc.	Rajiv Raja	93.50 %	2/11/2010 11:44:52 AM	Cancel
Energy Curtailment Specialists, Inc. ECS	Glen Smith	92.50 %	2/11/2010 11:44:59 AM	Cancel
EnergyConnect, Inc.	John Stremel	89.40 %	2/11/2010 11:44:50 AM	Cancel
EnergyConnect, Inc.	John Stremel	89.00 %	2/11/2010 11:35:17 AM	Cancel

RFP Architecting and Sequencing

RFPs ([New](#) | [RFP Builder](#))

Total RFP:

RFP	CC	RFP Description	Customer	State	Delivery Point	Term	Pricing	Quantity	UOM	Best Bid	Best Bidder	Status
8084	ELE	12 Month Fixed	Connecticut OPM	CT	Connecticut Light & Power (ELE)	12	Fixed	3,061,257	kWh	0.08440	Hess Corporation	Closed: Not Awarded
8085	ELE	24 Month Fixed	Connecticut OPM	CT	Connecticut Light & Power (ELE)	24	Fixed	3,061,257	kWh	0.08630	Hess Corporation	Closed: Not Awarded
8086	ELE	36 Month Fixed	Connecticut OPM	CT	Connecticut Light & Power (ELE)	36	Fixed	3,061,257	kWh	0.08750	Direct Energy Services, LLC	Closed: Not Awarded
8087	ELE	12 Month Fixed - 10% Green	Connecticut OPM	CT	Connecticut Light & Power (ELE)	12	Fixed	3,061,257	kWh	0.08500	Hess Corporation	Closed: Not Awarded
8088	ELE	24 Month Fixed - 10% Green	Connecticut OPM	CT	Connecticut Light & Power (ELE)	24	Fixed	3,061,257	kWh	0.08690	Hess Corporation	Closed: Not Awarded
8089	ELE	36 Month Fixed - 10% Green	Connecticut OPM	CT	Connecticut Light & Power (ELE)	36	Fixed	3,061,257	kWh	0.08800	Direct Energy Services, LLC	Closed: Not Awarded
8090	ELE	12 Month Fixed - 25% Green	Connecticut OPM	CT	Connecticut Light & Power (ELE)	12	Fixed	3,061,257	kWh	0.08900	Hess Corporation	Closed: Not Awarded
8091	ELE	24 Month Fixed - 25% Green	Connecticut OPM	CT	Connecticut Light & Power (ELE)	24	Fixed	3,061,257	kWh	0.09000	Direct Energy Services, LLC	Closed: Not Awarded
8092	ELE	36 Month Fixed - 25% Green	Connecticut OPM	CT	Connecticut Light & Power (ELE)	36	Fixed	3,061,257	kWh	0.09100	Direct Energy Services, LLC	Closed: Awarded

Multiple RFPs
Test Different Parameters
(Term, Green Mix, Product,
Pmt Terms, Pass Throughs, etc)
Sequencing Optimizes Results

Pristine Process

BUSINESS

UTILITIES

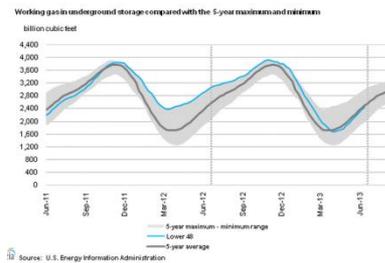
- Never a Successful Protest
- Perfect Record of Rate Case Approval

GOVERNMENT

INSTITUTIONS

- “Flawless” Execution of RGGI Auctions

Unparalleled Market Knowledge



- Market Directors **AVERAGE** 18 years experience
 - First ever deregulated transaction
 - Design of MA dereg
- Nearly 20,000 auctions; 40,000 pricing events
- Legacy of Innovation
 - Green power mix
 - Wholesale auctions
 - RGGI

World Energy Exchange

WorldEnergy

[Help](#) | [Setup](#) | [My Profile](#) | [Logout](#)

“The auction saved between 7 and 9% vs our traditional procurement methods.”

“The auction is brutally efficient at driving margins to the bare minimum.”

Offerers Post RFPs for Auction

Bidders Compete Aggressively for Contracts

Auction Generated Savings

First Bid (\$/kWh): 0.12000
 Best Bid (\$/kWh): 0.09030
 Your Total Usage: 111,669,671 kWh
 Cost - First Bid: \$13,400,360.52
 Cost - Best Bid: \$10,083,771.29

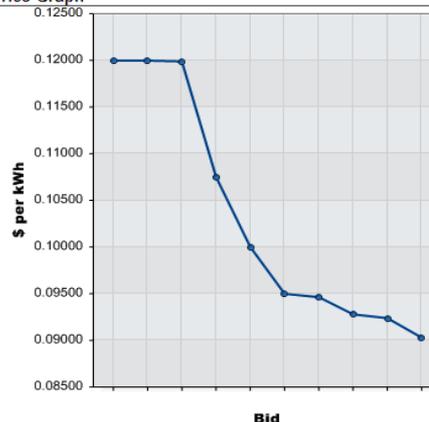
Total Auction Generated Savings :
 \$3,316,589.23 or 24.75 %

Market Benchmark Savings

Price-to-Compare (\$/kWh): 0.11000
 Best Bid (\$/kWh): 0.09030
 Your Total Usage: 111,669,671 kWh
 Cost - Price-to-Compare: \$12,283,663.81
 Cost - Best Bid: \$10,083,771.29

Total Market Benchmark Savings :
 \$2,199,892.52 or 17.91 %

Price Graph



Bid History (View: All Bids | [Low Bid Only](#))

Total Bids in View: 10

Company Name	Contact Name	Bid Amount	Date and Time of Bid	Action
Supplier D	Contact D	\$0.09030	8/14/2008 12:24:52 PM	Cancel
Supplier B	Contact B	\$0.09239	8/14/2008 12:24:55 PM	Cancel
Supplier A	Contact A	\$0.09280	8/14/2008 12:24:46 PM	Cancel
Supplier C	Contact C	\$0.09464	8/14/2008 12:24:53 PM	Cancel
Supplier B	Contact B	\$0.09500	8/14/2008 12:24:29 PM	Cancel
Supplier A	Contact A	\$0.10000	8/14/2008 12:15:35 PM	Cancel

Electricity Procurements

Procurement Planning

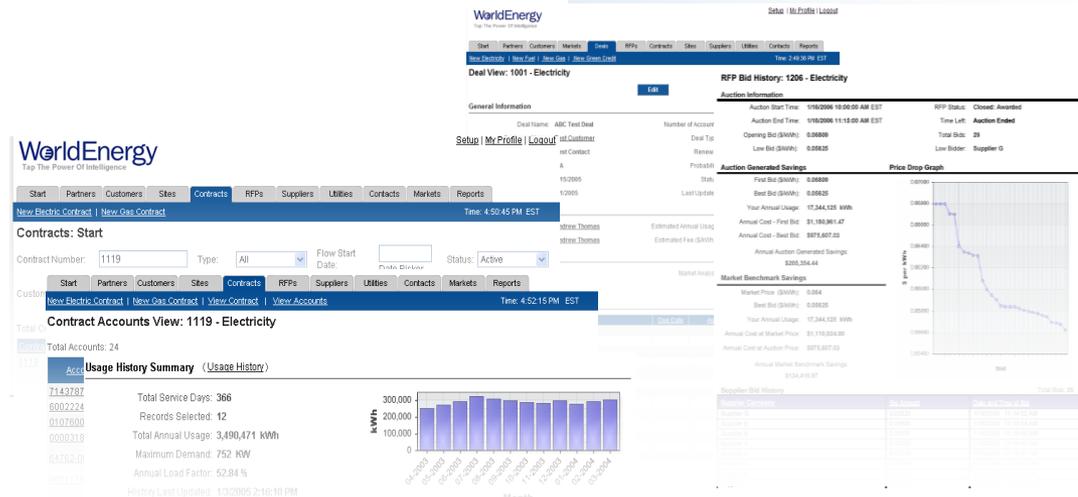
- Provide Market Info
- Define Energy Objectives
- Collect Bills & Usage Data
- Create Data Repository
- Discuss Green Options
- Develop Procurement Strategy
- Prepare Solicitation
- Create Website
- Build Supplier Interest
- Host Bidder Conferences
- Prequalify Suppliers
- Prepare Price to Compare Analysis

Procurement Execution

- Auction Platform Configuration
- Auction Monitoring
- Auction Based Price Discovery
- Assess Auction Results
- Provide Recommendations
- Contracting Support

Peace of Mind

- Prepare Due Diligence Book
- Support Enrollment
- Online Contracts, Sites & Usage
- Set Renewal Trigger Goals
- Monitor Market
- Provide Market Updates
- Management Reporting



Thank You



Planning



Sourcing



Risk Management



Efficiency



Sustainability



Incentives



Monitoring

WorldEnergy

To submit a question, please send a
'high priority' e-mail to

shavonna.neal@das.ohio.gov

Please indicate **"SPUG Question"** in the subject line.



Thank you for your questions and participation!

Next on the Agenda...

Vehicle Contract Update

Rob Rounds and David Colopy
DAS Office of Procurement Services

State of Ohio –
D.A.S. Procurement

Vehicle Contracts

Rob Rounds & David Colopy

Vehicle Contract Listing:

<u>Contract #</u>	<u>Contract Description:</u>	<u>Expiration Date:</u>
Multiple STS	Fire Truck and Related Vehicles & Ambulance (Rounds)	Various
GDC050	Law Enforcement Vehicles (Rounds)	09/30/2014
GDC093	Trucks (Colopy)	09/30/2014
GDC104	Auto and Vans (Colopy)	09/30/2014

*Be aware of build-out dates.



STS Fire Truck & Related Equipment Contract Listing:

Contract #	Contractor Name:	Expiration Date:
800208	E-One, Inc.	01/31/2016
800258	American LaFrance	08/31/2017
800135	KME (Kovatch Mobile Equipment)	12/31/2015
800180	Pierce Mfg., Inc.	08/30/2016
800046	Rosenbauer America	08/31/2014
800021	Smeal	05/31/2013
800257	Sutphen Corp.	03/31/2017
800321	US Tanker	09/30/2018



STS Ambulance & Related Equipment Contract Listing:

Contract #	Contractor Name:	Expiration Date:
800288	American Emergency Vehicles	02/28/2018
800263	Braun Industries	10/31/2017
800124	Excellance, Inc.	09/30/2015
800277	Osage	12/31/2017
800322	Horton Emergency Vehicles	12/31/2018
800217	Life Line Emergency Vehicles, Inc.	11/30/2015
800278	McCoy Miller	01/31/2017
800123	Medix Specialty Vehicles, Inc.	10/31/2014
800131	PL Custom Body & Equipment Co.	11/30/2015
800272	Road Rescue, Inc.	01/31/2017
800278	Wheeled Coach Industries, Inc.	11/30/2016
800299	Farber	05/31/2018

Law Enforcement Vehicles

- GDC050 – Law Enforcement Vehicles

Effective through 09/30/2014– The Ford Interceptor Sedan and SUV, Chevy Impala, Chevy Caprice and the Dodge Charger

- The Chevrolet Tahoe is new for 2015. We will do an add-on bid once it is available.

2014 Automobiles/Passenger Vans

- GDC104 – RS901314 – expires 9/30/14
- Midsize Sedan re-awarded to the Ford Fusion 11/26/13
- Partial MBE Set-Aside – 12 Passenger Van
- Be mindful of build out dates. Orders placed before “Order to Dealer” date guarantees delivery.

Build Out Schedule Example

MY13 Automobiles (RS901313)

BUILD OUT SCHEDULE

Amend #	Amend Date	OAKS #	Vehicle Description	Make/Model	Requisition Approval Date	Order to Dealer Date	Dealer Order Cut Off Date	Price Protection (Yes/No)
5	03/13/13	23593	1AA - Sedan – Compact – Gasoline	Ford Focus	09/19/13	09/26/13	09/30/13	Yes
4	02/25/13	23443	2AA - Sedan - Midsize - Gasoline	Dodge Avenger	04/19/13	04/26/13	04/30/13	
4	02/25/13	23451	3BA - Van - Compact, 7 Passenger – Flex Fuel	Dodge Grand Caravan	04/19/13	04/26/13	04/30/13	
5	03/13/13	23459	4BA - Van – Full Size, 8 Passenger – Flex Fuel	Ford Econoline	06/18/13	06/25/13	06/28/13	No
7	04/24/13	23469	5BA - Van – Full Size, 12 Passenger – Flex Fuel	GMC Savana 2500	*09/19/13	*09/26/13	*09/30/13	*Yes
6	04/11/13	24502	6BA - Van – Full Size , 15 Passenger – Flex Fuel	Ford E-350	06/18/13	06/25/13	06/28/13	

Key
Requisition Approval Date - Last day to have requisitions submitted, approved by ordering agency, and routed for central approval.
Order to Dealer Date - Last day to submit Purchase Orders to the dealer.
Dealer Order Cut Off Date - Last day dealer can submit order to manufacturer.
Price Protection - Model Year 14 is available at Model Year 13 contract pricing.

2014 Trucks/Utility Vehicles/Cargo Vans

- GDC093 – RS901514, expires 9/30/14
- ½ Ton Pickups through 18,000 GVW Cab & Chassis
- Added Crew Cab C&C and diesel engine options
- Partial MBE Set-Aside – ½ Ton Pickups
- Order now to ensure early builds



Unspecified Options

- GDC104 (Autos) & GDC093 (Trucks)
- For equipment/options not listed in contract
- Send pricing and justification to contract analyst (David Colopy)
- If approved, analyst send OAKS Item # for your requisition

Searching the State Procurement website

The screenshot shows the Ohio DAS State Procurement website. At the top left is the Ohio.gov logo with the tagline "So much to Discover!". To the right is the "Ohio DAS State Procurement" header. Below this is a navigation bar with links for "Contractors/Vendors", "Government Entities", "State Employees", and "the Public". The main content area features a large "State Procurement" graphic with a red outline of Ohio. To the right of the graphic are three buttons: "What's New HELP", "Selling to the State HELP", and "Current Contracts HELP". On the left is a dark red sidebar menu with the following items: "What's New", "Selling to the State", "Current Contracts", "Find It Fast", "Procurement Contracts", "Help & Reference Materials", "FAQ", "Forms", "Web Links", "Comments/Questions", and "Web Site Tutorials". A red arrow points from the "Find It Fast" link in the sidebar to a red box containing the text "1. Click 'Find it Fast'". Below this box is a paragraph of text: "The State of Ohio Procurement web site displays all procurement opportunities and supplies and services contract information administered by the Department of Administrative Services (DAS). This agency issues all major procurement opportunities and negotiates all contracts displayed unless otherwise noted." At the bottom is a footer with links: "state home", "DAS home", "site map", "contact DAS", "search DAS", and "privacy poli".

Ohio.gov
So much to Discover!

Ohio DAS
State Procurement

for Contractors/Vendors for Government Entities for State Employees for the Public

State Procurement

What's New HELP
Selling to the State HELP
Current Contracts HELP

Find It Fast

1. Click "Find it Fast"

The State of Ohio Procurement web site displays all procurement opportunities and supplies and services contract information administered by the Department of Administrative Services (DAS). This agency issues all major procurement opportunities and negotiates all contracts displayed unless otherwise noted.

state home DAS home site map contact DAS search DAS privacy poli



- Procurement Home
- Think Ohio First Score Card
- Selling to the State
- Advanced Search
- Find It Fast
- Procurement Contacts
- Help & Reference Materials
- FAQ
- Forms
- Web Links
- Comments/Questions
- Training/Tutorials

Find It Fast

Find it Fast is a quick way to find an opportunity or contract. To find an opportunity or contract choose a Type and enter a complete or partial number. Use the [Current Contracts](#) or [Procurement Opportunities](#) functions for a more detailed search.

Find It Fast:

Step 1: Select the Type

- Doc/Bid/Schedule #
- Index Number

Step 2: Enter the Number



Step 3: Press the Button

[Return to Home Page](#)

2. Enter the index number.

Important considerations:

- All non-STS contracts are bid, lowest vehicle meeting spec wins. Each year there may be different makes and models.
- Be mindful of the contractor's index on at the end of the contracts. Vendors request purchase orders differently (fax, email, etc.) . Ordering in the method requested will help ensure prompt and accurate delivery.
- Fire Truck & Ambulance contracts are negotiated contracts not bid.
- Build out dates are published once known through amendments. Look for the build out date before ordering as the vehicle may not be available. DAS will try to extend all vehicles to next model year if agreed upon.

Questions





OhioDAS

Office of Procurement Services

Analysts:

Rob Rounds

Contract Analyst

614-728-8594

Rob.Rounds@das.state.oh.us

David Colopy

Contract Analyst

614-466-4362

David.Colopy@das.state.oh.us

TEAM MANAGER:

Alan Childress

Team Manager: Fleet/Motorized Equipment/Misc.

614-466-4265

Alan.B.Childress@das.state.oh.us

***See contact list for contract analysts:**

<http://procure.ohio.gov/proc/viewContacts.asp?divID=2&divCode=GSD>

To submit a question, please send a
'high priority' e-mail to

shavonna.neal@das.ohio.gov

Please indicate **"SPUG Question"** in the subject line.



Thank you for your questions and participation!

Next on the Agenda...

MBE Updates

Todd McGonigle
EEO Program Manager
Equal Opportunity Division

To submit a question, please send a
'high priority' e-mail to

shavonna.neal@das.ohio.gov

Please indicate **"SPUG Question"** in the subject line.



Thank you for your questions and participation!

Next on the Agenda...

MBE: Sharing Best Practices

Amy Drapcho

Deputy Director of Finance and Planning
Ohio Department of Youth Services

Ohio Department of Youth Services



MBE PROGRAM: SHARING BEST PRACTICES

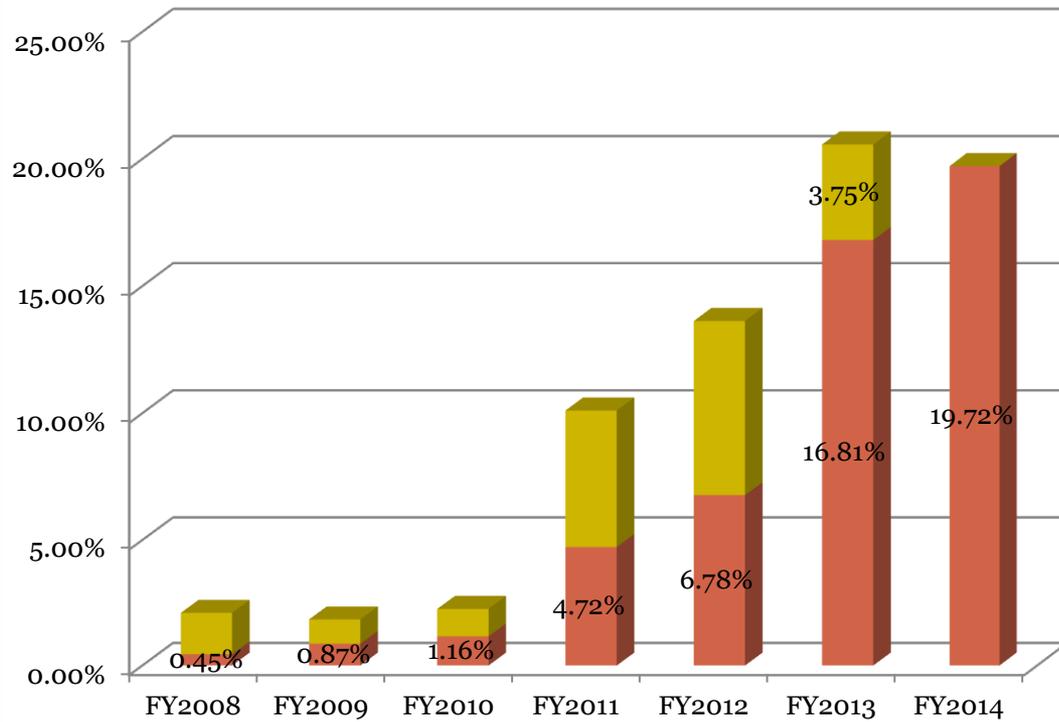
AMY DRAPCHO, CFO

DYS Keys to Success



- Quarterly site visits to fiscal staff at juvenile correctional facilities
- Annual MBE all-day summit for agency fiscal staff
- Friendly competition among sites for MBE set-aside spending
- Philosophy of “Think MBE First” with every purchase at all sites
- Quarterly MBE newsletter featuring new vendors, recent MBE purchases, etc.
- New Payment Card Database with built-in workflow to facilitate MBE spending & proper coding & flagging in OAKS
- Implementation of MBE Agency-wide Master Plan

DYS Historical MBE Spending FY2008 – FY2014



■ **DYS Historical MBE Expenditures Participation %**

■ **DYS Historical MBE Expenditures Set-Aside %**

MBE Annual Summit

MBE Summit – May 8, 2013
Ohio Rehabilitation Services Commission
150 E. Campus View Blvd., 3rd Floor
Columbus, Ohio 43235

Agenda Topics

9:00 AM Welcome & Icebreaker - Amy Drapcho
Dave Blackburn



10:00 AM State Perspective: Where We Are, Where We
Need to Go, How to Get There –
Richard Scott, Deputy Director, EOD

11:30 AM Perspectives from Other State Agencies
Shawn Smith-PUCO
Reginald Wheeler-DRC
Jenny Jones-RSC
Tonya Briggs-DDD

12:00 – 1:00 LUNCH

1:00 PM

CNN LIVE BROADCAST FROM DYS MBE SUMMIT



*Site Presentations on
FY14 MBE Spending Plans*

3:00 PM Demo of New P-Card System

3:30 PM Wrap Up & Adjourn

FY14 - 1st Quarter Customer Service Site Visit



- Agency FY14 MBE Projection Plan
 - Governor's Agenda, ORC 125.081 (b)
 - 15% Set-Asides vs. Participation Requirement
 - Agency Historical MBE Expenditures Chart
 - Direct Authority Procurement and DAS STS Contracts (attached Director Blair July 9th Letter and list of MBE Set-aside and STS Contracts)
-
- Review facility FY14 MBE Projection Plan
 - Discuss site plan
 - Review FY14 1st Quarter MBE Report
 - Discuss future MBE spending plans
-
- Tools to Help Manage FY14
 - Agency MBE Master Plan Vision and Goals
 - PCard Database
 - Proper Use of Contract Numbers
 - Using the Proper Account Codes
 - Don Evans, MBE/EDGE Officer DAS MBE Vendor Updates by Email
 - MBE Quarterly Newsletter, soliciting ideas for submissions (highlight articles)
 - Establish a site MBE Achievement Team (ask site to send a list of names)
-
- Next Steps
 - Achievement Team training for each site's MBE team
 - Discuss Procurement SOP Draft to include bidding items to help sites with MBE set-aside bids



MBE Achievement Team
Training
November 26, 2013

- ❖ Business Office
- ❖ Maintenance
- ❖ Medical Staff
- ❖ Recreation
- ❖ Education
- ❖ Food Service
- ❖ Storeroom

Agenda

9:00 AM	Welcome & Icebreaker
9:35 AM	MBE Update and Training Purpose
10:30 AM	Minority Business Assistance Centers Role <i>Jennifer Averri-Frost</i>
	Development Services Agency Role <i>Joseph Brooks</i>
11:00 AM	Keys to Success
12:00 – 1:00 PM	LUNCH
1:00 PM	How to Build a Successful Team and Team Activity <i>MBE Journey to the Top of the Mountain Game</i>
	Ideas for Promoting your MBE Plan
3:00 PM	Procurement Requirements and Support
3:30 PM	Wrap Up & Evaluation
Adjourn	

MBE Master Plan: Goal 1



To develop an achievable and fiscally responsible plan for FY2014 to offer at least 15% of MBE eligible purchases for set-aside competition.

- The Deputy Director, Division of Finance and Planning will appoint an agency MBE Achievement Team to outline a plan of action for the agency to meet the MBE set-aside goal
- The agency MBE Achievement Team will identify an agency list of account codes that purchases can be set-aside for MBE competition by June 30, 2013
- Each facility will develop site specific MBE set-aside plans for purchase opportunities, broken out by quarterly projected expenses by June 30, 2013
- The agency MBE Achievement Team will conduct FY14 quarterly meetings with each site to review their site set-aside expenditures and site specific plan compliance

MBE Master Plan: Goal 2



To encourage minority business enterprise certified vendor involvement during the bidding process by working with the office of Equal Opportunity Division and local organizations and agencies to increase MBE participation.

- The agency MBE/EDGE Officer will work with the office of Equal Opportunity Division at DAS to facilitate vendor certification process during FY14
- The agency MBE/EDGE Officer will work with Ohio Dept. of Development, Office of Minority Business to help recruit and/or identify potential vendors during FY14
- The agency MBE Achievement Team will participate in statewide or local vendor fairs and other forms of outreach to the minority business community during FY14
- The Procurement Administrator will work with all entities above, as well as Local Minority Business Assistance Centers, to advertise DYS set-aside opportunities during FY14

MBE Master Plan: Goal 3



To develop customized training and information for agency leaders on the minority business enterprise program to increase support and participation in planning and monitoring MBE activities

- The Deputy Director, Division of Finance and Planning will schedule MBE summit meetings to provide information and training on MBE requirements and expectations during FY14
- The agency MBE Achievement Team will provide agency employees involved in purchasing opportunities MBE program training
- The agency MBE Achievement Team will continue two-way communication with agency managers & fiscal staff through ongoing emails, meetings, trainings during FY14

MBE Master Plan: Strategies



- Establish an MBE Achievement Team and hold monthly planning meetings to outline a plan of action for how the agency will meet the MBE set-aside goal and to provide oversight and support of the agency's MBE Master Plan. (The Management Team should consist of the Deputy Director, MBE/EDGE Officer, Procurement Administrator, Accounting Manager and Project Manager)
- Designate an agency MBE/EDGE Officer who is responsible to manage and implement the agency MBE plan on a day-to-day basis and disseminate information on available MBE business opportunities and serve as liaison with DAS and other state agencies
- Be reasonably aggressive when developing agency's MBE set-aside plans to reach MBE goals by setting goals higher than 15% to ensure achievable success
- Diversify planned expenditures by not creating bundle purchasing, to create more business opportunities for MBE vendors by posting request for procurement documents on the agency's internet page for online listing of agency procurement opportunities
- Identify minority business opportunities for the new agency payment card process that has been developed to maximize payment card purchases with MBE vendors. The payment card is one of the fastest growing procurement vehicles in state agencies and can provide a significant source of MBE participation.
- Prepare monthly MBE reporting for agency's eligible and set-aside expenditures in order to track and monitor progress to meeting the MBE set-aside goal
- Continue to have staff attend statewide Kaizen events sponsored by DAS to stay current on state-wide MBE program activities
- Continue to benchmark with other state agencies to share best practices and strategies
- Publish a quarterly MBE newsletter to be posted on the agency intranet page
- Send out regular communication internally on newly certified vendors, local MBE events and activities, and other important resources

Ohio Department of Youth Services

AGENCY GOAL: 15% MBE Set-Aside Spending, 5% EDGE Spending....

MBE QUARTERLY NEWSLETTER APRIL—JUNE 2013

INSIDE THIS ISSUE:

Fiscal Year 2013
Final MBE Score.....1

2nd Annual MBE Summit:
Climb the Mountain.....2,3

Vendor Spotlights3

Maryland MBE Program.....4

Wisconsin MBE Program ...4

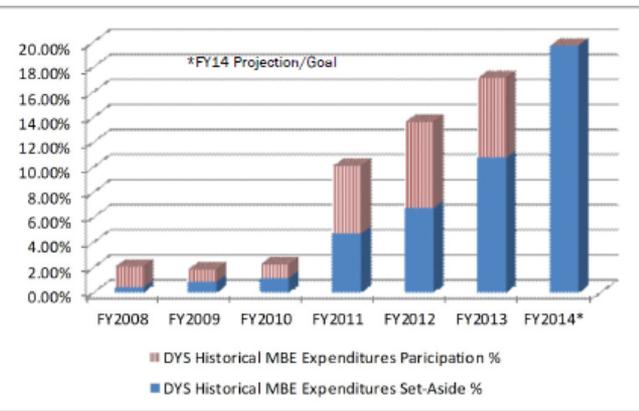


Summer Activities for Your
MBE Projection Plan
Success.....5

DYS Achieves 17% MBE Spending in Fiscal Year 2013!

Fiscal Year 2013 has come to a close, and DYS finished the year with a whopping 17.13% in MBE spending. This exciting achievement is the result of many people's hard work and commitment to the MBE Program throughout the agency, including regional offices, juvenile correctional facilities, the Bureau of Information Technology Services, the Bureau of Professional Organization and Excellence, and other Central Office staff. As the graph below illustrates, DYS has come a long way in a relatively short period of time. In just 5 years, the agency has gone from 2% MBE spending to over 17% - a rate 8 times higher. We are now able to confidently say "Yes We Can, Yes We Will, Yes We Did". While we are all very proud of this accomplishment, we have set an even higher goal for Fiscal Year 2014. Our focus will now be on MBE set-aside bids and awards, as we continue to climb the mountain toward success.

DYS MBE Participation & Set-Aside Spending FY08-14



How to Contact ODYS MBE/EDGE Officer: Don Evans

Email: Don.Evans@dys.ohio.gov

Phone: 614-752-9392



2nd Annual DYS MBE Summit May 8, 2013

On May 8, 2013, DYS fiscal staff from juvenile correctional facilities, regional offices, and central office gathered for the 2nd Annual MBE Summit, held at the Rehabilitation Services Commission.



Richard Scott, Director of the Equal Opportunity Division at the Ohio Department of Administrative Services, was the keynote speaker. He updated the group on the current status of policy, process and expected outcomes and measurements. He was accompanied by Todd McGonigle, EEO Program Manager.



A panel of guest speakers from other state agencies spoke about their agencies' approach to MBE programs, sharing both obstacles and best practices. (Left to Right: Rignald Wheeler, DRC; Tonya Briggs, DODD; Jenny Jones, RSC; Shawn Smith, PUCO)



Stephanie Garrett and Mary Butts represent the Bureau of Professional and Organizational Excellence with pride.

The Regional Business Office Managers say "Yes We Can, Yes We Will!" (Left to Right: Kristin Powell, Laura Melnick, Michelle Papson, Richard Clark)



If you have any ideas for features to include in future newsletters, please let us know! Contact Don Evans at Don.Evans@dys.ohio.gov with any ideas or suggestions!

DYS MBE Newsletter

New Vendor Spotlight



Suggs Medical Consulting
 Medical Physician
 923 Mueller Drive
 Reynoldsburg, OH 43086
 (614) 209-9675
ilvlord2@yahoo.com

Hannah
 Medical Physician
 640 Evening Star Lane
 Cincinnati, OH 45220
 (513) 961-1619
samuelkz@aol.com

Annashae Corporation
 Employment Services (Hiring/
 Recruitment) 673C Alpha
 Cleveland, OH 44143
 (440) 449-2662
rbellamy@annashae.com
www.annashae.com

C&M Medical Supply, LLC
 Medical equipment and supplies
 8600 South Wilkinson Way #C
 Perrysburg, OH 43551
 (419) 872-0033
CTarrant@cmmedicalsupply.com
www.cmmedicalsupply.com



2nd Annual DYS MBE Summit May 8, 2013

Our very own DYS News Network Anchor, Dave Blackburn, conducted interviews of representatives from Indian River JCF, Cuyahoga JCF, and Scioto JCF. Each interview gave the sites the opportunity to explain their FY 2014 MBE Spending Plan and their approach to the program. It was filmed in front of a live studio audience!



Pictured Top to Bottom: Dave Paulin, IRJCF; Dave Blackburn, Central Office; Colleen Roberts, SJCF; Gary Schultz, CHJCF, Steve Matas, CHJCF; On the Left: Pat Roberts, Central Office

MBE Around the Country

MARYLAND'S MBE PROGRAM LEADS THE NATION

- 25% goal — the highest in the nation.
- One of the oldest programs in the nation (over 30 years old).
- One of approximately 15 states with an MBE Program.
- One of only 4 states that have an MBE Law in the State statute.
- The 1st state to establish a sub-goal for African American-owned firms.
- The only state that collects uniform reporting data including payments to MBEs.

For More Information about Maryland's MBE Program, click http://thesailyrecord.com/wp-files/_pdf/publications/minority%20business.pdf



Wisconsin Minority Business Program

The purpose of the Minority Business Certification Program is to increase the opportunity for minority firms to sell their products and services to the State of Wisconsin. A certified minority business is eligible for a 5 percent bid preference on state purchases. The Wisconsin Department of Administration monitors state agencies' compliance with the purchasing guidelines that have been established for minority business procurement through this Act.

Benefits

- At least 5 percent of state purchasing and contracting is targeted for certified minority-owned businesses.
- Certified minority-owned firms are eligible for a low-bid waiver as long as their bid is no higher than 5 percent of the lowest qualified responsible bidder.
- Certified minority-owned firms can participate in the awards competition at Marketplace, the annual Governor's Conference on minority business development; a statewide minority marketing conference sponsored by the Wisconsin Economic Development Corporation (WEDC).
- Certified minority-owned firms are eligible to be listed in the State of Wisconsin's Directory of Minority-Owned Businesses which is circulated to corporate buyers throughout the state purchasing agents.

For More Information about Wisconsin's MBE Program, click <http://www.doa.state.wi.us/section.asp?inkid=224&locid=171>

Central Ohio Minority Business Association (COMBA) offers certification training opportunities. Call 614-252-8005 to learn more!

DYS MBE Newsletter July – Sept 2013

Ohio Department of Youth Services

AGENCY GOAL: 15% MBE Set-Aside Spending, 5% EDGE Spending.....

MBE QUARTERLY NEWSLETTER JULY—SEPTEMBER 2013

INSIDE THIS ISSUE:

First Quarter Results.....1

Development Services
Agency: Minority Business
Assistance Centers.....2

New MBE Vendors.....3

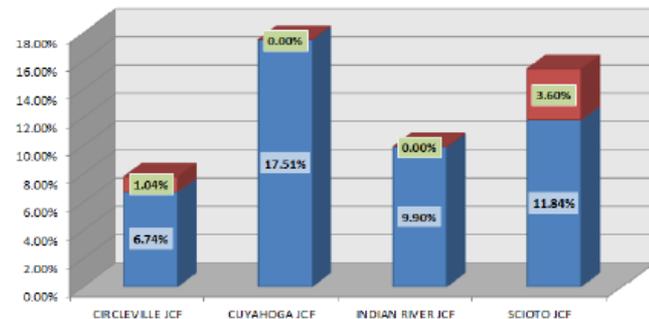
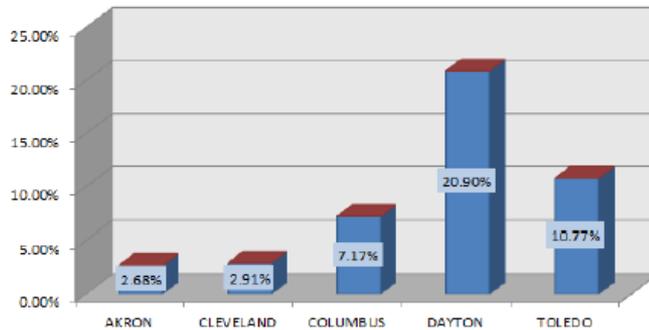
MBE Around the Country.....3

Regional Offices Get Set-
Aside Credit..... 4

Cuyahoga Hills JCF Attends
Vendor Fair.....4

Thinking How We Can Make
Positive Change5

Cuyahoga Hills JCF and the Dayton Regional Office take the lead in the First Quarter, exceeding their 15% set-aside goal!!



■ Fiscal Year 2014 DYS Non Set-Aside MBE Expenditures
■ Fiscal Year 2014 DYS Set-Aside MBE Expenditures

How to Contact ODYS MBE/EDGE Officer: Don Evans

Email: Don.Evans@dys.ohio.gov

Phone: 614-752-9392

Welcome to Our
Newest Members of
the MBE/EDGE
Vendor Community

Move It Service

Tyrone Myrick, PO Box 11941, Cincinnati, OH 45211, Phone (513) 545-0243; Fax (513) 245-1907 - Email: moveit-service@aol.com

Morally Excellent Services LLC

Cecil Ahad, 4950 Cleveland Avenue, Columbus, OH 43231, Phone (614) 496-2451; No fax Provided, Email: mecllc1@netzero.com

Unique Construction Services

Kamlesh Kotharis 10999 Reed Hartman Hwy, Cincinnati, OH 45242, Phone (513) 608-1363; Fax (513) 791-1737 - Email: uniqueconstruction@zoomtown.com

Dayton Sweeping Services, Inc.

Viki Kroeger, 1520 Nicholas Road, Dayton, OH 45417, Phone (937)262-0123; Fax (937) 262-9323 - Email: viki@dss-sweeping.com

Gerard Diaz

Gerard Diaz, PO Box 82267, Columbus, OH 43202, Phone (614) 262-6662; NO FAX - Email: crtc@crtc.com

DC Heating & Cooling, Inc.

Islaiah Cheatham, 870 Band Street, Akron, OH 44305, Phone: (330) 762-1992; Fax: (330) 762-1991, Email: lmcheatham@gmail.com

MBE Around the Country



MBDA an agency in the US Department of Commerce helps create and maintain U.S. jobs by promoting the growth and global competitiveness of large, medium and small businesses owned and operated by members of the minority and Diaspora communities.

Through a national network of more than 40 business centers, MDSA offers wide range of domestic and international strategic partners with the technical assistance and access to capital, contract opportunities and new markets that they need to create new jobs.

There is a MBDA Business Center located in Cleveland, Ohio (<http://www.mbda.gov/businesscenters/businesscenters>).

They have a number of programs to assist MBEs:

- [Advocacy and Outreach](#)
- [Business Centers](#)
- [Business Services](#)
- [Grant Competitions](#)
- [National Advisory Council on Minority Business Enterprise](#)
- [Office of Native American Business Development](#)

Connecticut and Illinois Invest in Minority Business

Reference: [MBDA Newsletter Article August 15, 2013](#)

State of Connecticut Invests \$2M for Minority Business Assistance Program

On July 24, 2013, Connecticut Governor Dannel P. Malloy announced that the State of Connecticut will provide \$2 million to support minority contractors through the Hartford Economic Development Corporation. The program will be designed to help businesses obtain surety bonds for capital construction. It will also provide a revolving loan fund to help minority contractors cover costs incurred while awaiting payment during the construction phase of projects. This represents the latest move by the state to bolster its growing minority-owned business community which comprises 12 percent of state businesses. Connecticut already requires 25 percent of funding allocated for public building projects, highway construction and the purchase of goods and services must go to small businesses. Of that amount, 6.25 percent must go to minority-owned businesses, women-owned businesses, or disadvantaged businesses with a net worth less than \$750,000.

Illinois Establishes Revolving Loan Fund

On July 30, 2013, Illinois Governor Pat Quinn signed into law House Bill 3267, which is designed to assist minority and women-owned businesses compete for state construction contracts. The new law creates the Disadvantaged Business Revolving Loan Program, which allows the Illinois Department of Transportation (IDOT) to give low-interest loans to certified minority- and female-owned businesses that have construction contracts with IDOT. To establish the fund, the State will provide an initial investment of \$3 million. After that, it is anticipated that the fund will be self-sustaining through payments on existing loans.

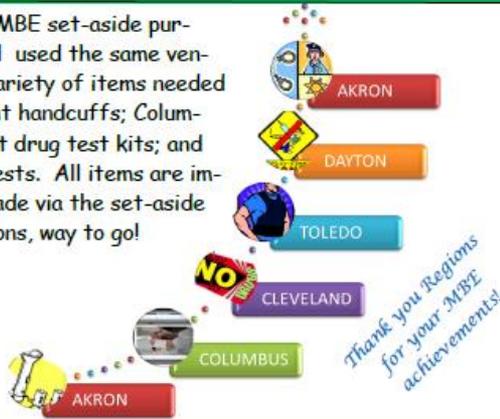


DYS MBE Newsletter

All 5 Regional Offices Start FY14 with MBE Set-Aside Credit in 1st Qtr

All five regional offices had successful MBE set-aside purchases during the first quarter. They all used the same vendor, Uzuri Kid Kidz, LLC to purchase a variety of items needed by their office. The Akron Region bought handcuffs; Columbus, Cleveland and Dayton Regions bought drug test kits; and the Toledo Region bought bullet-proof vests. All items are important to doing business and all were made via the set-aside competitive bid process. Great job Regions, way to go!

Uzuri Kid Kidz, LLC
Contact Information
Melissa Perkins
6262 Alissa Lane
Columbus, OH 43213
(614)440-4601



Cuyahoga Hills JCF

On September 18, 2013 Gary Schultz and Steve Matas from Cuyahoga Hills Juvenile Correctional Facility attended a small business vendor fair at Executive Caterers at Landerhaven. The event was sponsored by The Global Business Connection, Honda of North America, Kent State University and the Ohio Bureau of Workers Compensation. There were over 70 exhibitors and small businesses in attendance including the Minority Business Assistance Centers of Youngstown, Toledo, Akron and Cleveland. There were speakers, workshops, and match sessions between suppliers and purchasing professionals for goods, services and construction capabilities. It was a very productive event for DYS to attend.



Central Ohio Minority Business Association (COMBA) offers certification training opportunities. Call 614-252-8005 to learn more!

Thinking how we can make positive Change



David H Blackburn

Change can be harder than it needs to be because we sometimes make it more mysterious than it needs to be. You may be trying to change something right now. And, if you're honest, you probably have already thought about backing off. You may think that change seems too difficult.

It doesn't need to be quite that mysterious. During the 1st Quarter FY14, Finance and Planning staff visited each of the facilities to meet with the In-direct Deputy Superintendent and staff to discuss their site's FY14 MBE Projection Plan. One of the tools that we presented to assist the facility to achieve their goal, was to establish a MBE Achievement Team for their site.

Now that the state wide agency goal is focused on MBE set-aside instead of MBE participation, this represents change. Staff will not be nearly as opposed to this change if we provide them with the knowledge and understanding of the ORC and why it is important to achieve this goal.

If you are passionate about change, then you will be committed to working with others to bring it to reality. I've lived through lots of change in my career I can vouch for the fact that implementing change is possible in a positive way.

Change can be hard because it is our nature to only want what we already know and like. Have you ever craved something that you have never eaten? Remember staff will be more comfortable with the way they are used to doing business than changing how they do business. Trying something new or different can be challenging. They just want to keep things the way they have been. Remember that when they tell you about how good things used to be when all we needed to do was just purchase from a MBE vendor. We are now asking them to prepare and price request document and solicited bids from certified MBE vendors.

That's why it is so important to paint a clear picture of how you want to change. I believe if change fails, it may be because we didn't have a well-defined strategy to implement the change. We can develop a vision about our anticipated change, but we need to work at getting staff rallied around a common strategy to implement the change. That's why we shared our agency MBE Master Plan vision and strategies during our site visits. It gives you a road map on how we plan to achieve this change in focus regarding MBE set-aside goals.

When people are aligned around a common vision and strategy, so much more becomes possible. That's why I believe that staff involved in the procurement process will realize the importance of the MBE set-aside program and they will come on board and helps achieve our agency goal. Remember, we can't build the future on a vision of how we did things in the past.

We are excited to hear about your site's MBE Achievement Team strategy to implement this change with MBE business purchases to reach your site's set-aside goal.



Questions?



If you would like hard copies of any materials mentioned today, please contact:

Amy Drapcho, CFO (614) 466-7118

Amy.Drapcho@dys.ohio.gov

Don Evans, DYS MBE/EDGE Officer (614)752-9392

Don.Evans@dys.ohio.gov

To submit a question, please send a
'high priority' e-mail to

shavonna.neal@das.ohio.gov

Please indicate **"SPUG Question"** in the subject line.



Thank you for your questions and participation!

Next on the Agenda...

MBE Set Asides under the State Term Schedule (STS) Program

Jean Stephenson, State Purchasing Contracts Manager
Tammy Marcum, Procurement Manager
DAS Office of Procurement Services

On March 19, 2013 DAS Director Robert Blair issued a memorandum outlining our efforts to improve the MBE Set Aside Program:

- ✓ Governor's priority
- ✓ Improve MBE contracting in Ohio
- ✓ Improve operation and delivery of the MBE Program

Let's review the changes....

Agencies can flag vouchers as MBE Set Asides for STS contract purchases if the following two criteria are met:

- ✓ STS purchase is deemed an MBE set aside if the procurement is conducted as a sheltered solicitation exclusively for competition among the certified MBE STS holders or dealers, and
- ✓ Three or more MBE schedule holders or dealers are available in the STS area/category.

If an MBE vendor on STS is selected without this sheltered competition, or if an MBE is selected through open market competition, those purchases will continue to be classified as MBE participation.

Some questions you may ask...

1. Q: How are STS contracts flagged in OAKS?

A: Procurement Services will set the MBE flag as S on the contract page in OAKS. The S flag in OAKS represents STS contracts within an index number that have at least three or more certified contractors or dealers. Agencies will not need to change the voucher to MBE in order to receive credit on the purchase if they conducted the purchase as a sheltered solicitation exclusively for competition among the certified MBE STS holders or dealers.

2. *Q: The contract had an S in OAKS the last time I used it but now it is gone?*

A: There are no longer three MBE contractors or dealers with in the STS Category

Remember to check the Procurement Web site often at www.Ohio.gov/procure for an updated list of Minority Business Enterprise Competition contracts.

DAS General Services Division is compiling procedure documents to help agencies navigate through these recent MBE procurement changes.



State Procurement

for Contractors/Vendors

for Government Entities



- Purchasing Marketplace Directory
- Cooperative Purchasing Program
- Community Rehabilitation Program
- What's New
- Think Ohio First Score Card
- Selling to the State
- Current Contracts
- MBE/EDGE Contracting
- Find It Fast
- Procurement Contacts
- Help & Reference Materials
- FAQ
- Forms
- Web Links
- Comments/Questions
- Training/Tutorials
- Login



The State of Ohio's Procurement Web site provides access to bid opportunities and contract award information for supplies and services from all levels of state government.

www.Ohio.gov/procure

Click Current Contracts

state home

OIT home

DAS home

site map



Current Contracts



Search Using the Alpha List

HELP

Search by Contract Type

HELP

--Make a selection--

--Make a selection--

- All Contract Types / Methods
- Requests for Proposal (RFP)
- One-Time Contracts
- Multiple Award Contracts (MAC)
- Invitations to Bid (ITB)
- State Term Schedules (STS)
- Master Maintenance Agreements (MMA)
- Cooperative Purchasing Agreements (Co-op)
- Set Aside (MBE) Contracts
- MBE Participation Contracts
- Minority Business Enterprise Competition
- EDGE Contracts
- Community Rehab. Program (CRP) Contracts
- Limited Distribution Contracts (LDC)
- General Distribution Contracts (GDC)
- FY2008 Contract Awards (PO) Over \$25,000
- FY2009 Contract Awards (PO) Over \$25,000

Select Minority
Business Enterprise
Competition

Procurement Home

What's New

Think Ohio First Score Card

Selling to the State

MBE/EDGE Contracting

Find It Fast

Procurement Contacts

Help & Reference Materials

FAQ

Forms

Web Links

Comments/Questions

Training/Tutorials

Login

state home

OIT home

DAS home

site map

cont



[Procurement Home](#)

[Current Contracts](#)

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[Find It Fast](#)

[Procurement Contacts](#)

[Help & Reference Materials](#)

[FAQ](#)

[Forms](#)

[Web Links](#)

[Comments/Questions](#)

[Training/Tutorials](#)

[Login](#)

Search for Minority Business Enterprise Competition (MBE3)

Enter the Minority Business Enterprise Competition (MBE3) contract search criteria below and select [Search] for results. Click the hotlinked labels for more information about each search criteria.

** Click For More Information*

[BWC Contribution Restriction Language](#)

General Criteria

Commodity Category: All

Contract#:

Index #:

Date Range

Step 1: Select Type --Select Type--

Step 2: Specify a Range

Date From: 

Date To: 

[Return to Current Contracts](#)

Enter specific
STS Index
Numbers
or
Click Search to
bring back all
MBE3 STS
contracts

To submit a question, please send a
'high priority' e-mail to

shavonna.neal@das.ohio.gov

Please indicate **"SPUG Question"** in the subject line.



Thank you for your questions and participation!

Next on the Agenda...

Ohio Marketplace Update

Jean Stephenson, State Purchasing Contracts Manager
DAS Office of Procurement Services



MARKETPLACE
eCatalog

Shop • Procure • Pay

The Ohio Marketplace **LIVE**...on August 5, 2013!

- Combined effort by DAS and Ohio Shared Services (OBM)
- Online internet shopping experience
- Purchase from approved eCatalogs and return 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 techniques that can be used to more effectively manage 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



MARKETPLACE eCatalog

Shop • Procure • Pay

The SciQuest eCatalog tool is one of several techniques that can be used to more effectively manage spend

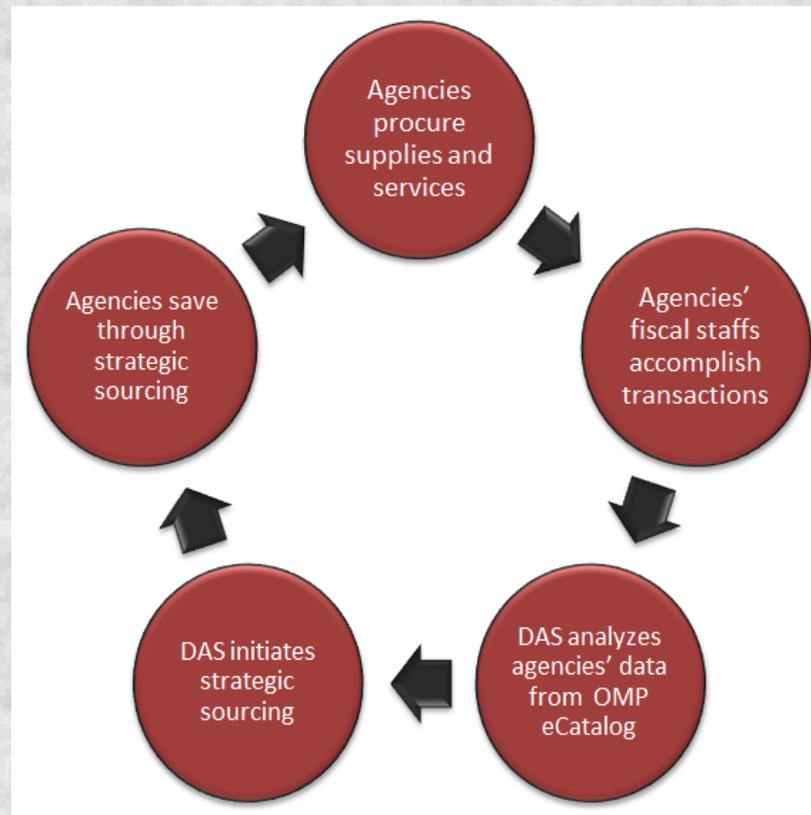
What can it do?

- Funnel demand to targeted contracts
- Facilitate e-Invoicing and prompt pay enhanced through the integration of the AP Director tool
- Reinforce adherence to policies and priorities
- Integrate into OAKS Financials for requisition approvals and budget checking



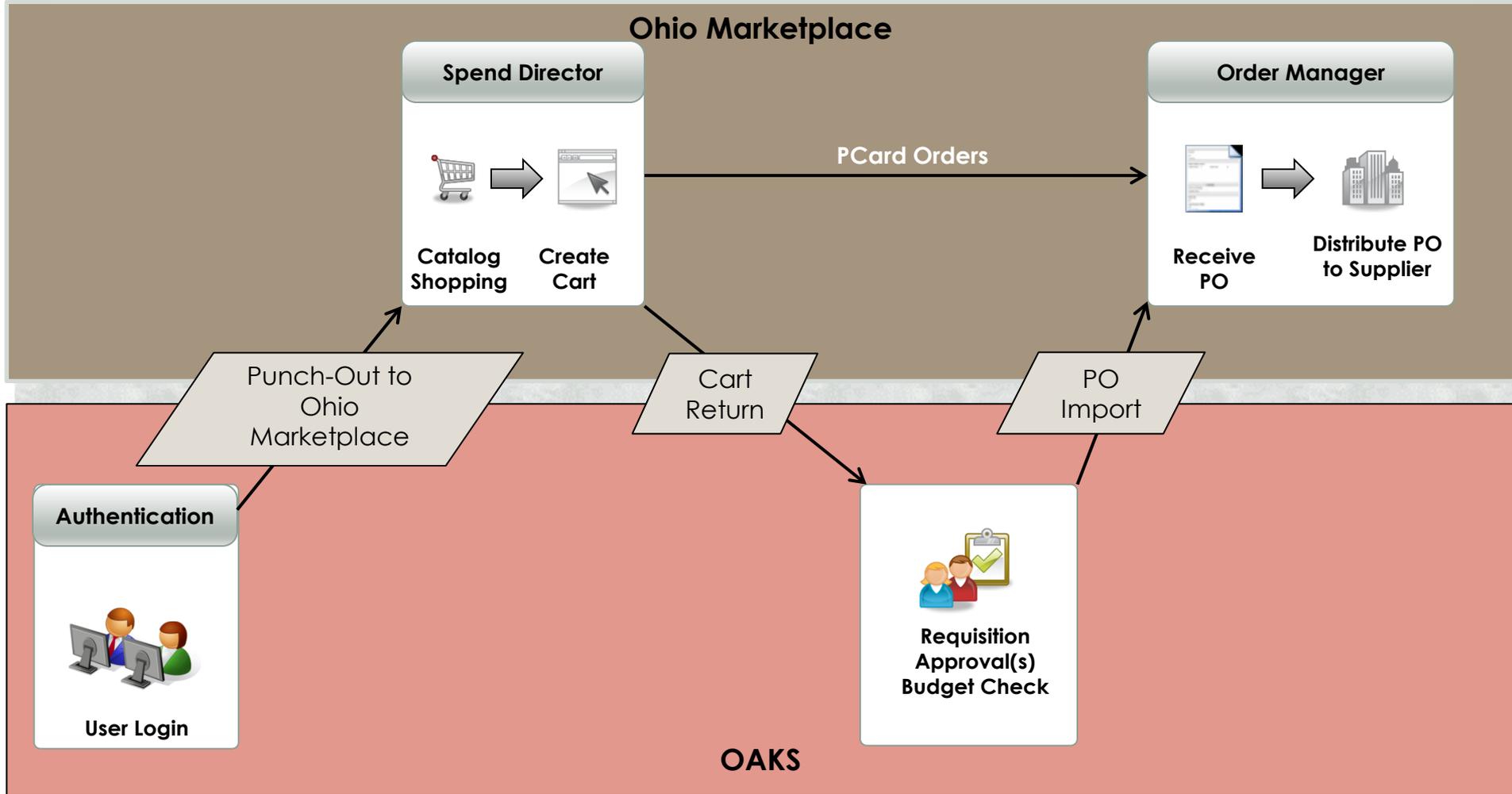
MARKETPLACE eCatalog

Shop • Procure • Pay



OHIO MARKETPLACE FLOW OVERVIEW

- Release 1 Solution





MARKETPLACE
eCatalog

Shop • Procure • Pay

eCatalog selection process ...

- Vendor currently holds 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



MARKETPLACE
eCatalog

Shop • Procure • Pay

eCatalog selection process ...

Currently 27 eCatalogs are available:

Office supplies

General hardware /MRO

Lab equipment

Medical supplies

Body armor

General purpose clothing and undergarments

Our current vendor “PUSH” = 20 additional eCatalogs:

Medical staffing, nutrition

Additional contracts will continue to be enabled!



Pilot agency schedule

August 5 – October 31, 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
- **DAS and OBM - November 4 - December 5**
- Additional agency waves are scheduled in 2014...



Training

- 30 minute web-based overview *(required)* to establish OAKS roles.
 - Web-based overview must be completed prior to scheduling instructor-led training.
- Instructor-Led training *(recommended)*
 - Sessions are scheduled based on enrollment. If demand increases, more classes will be added.
- Training resources and job aids are available @ https://myohio.oaks.ohio.gov/psp/PAPRD/EMPLOYEE/EMPL/h/?tab=OH_FIN_HOME. See “Financials Training Materials” tab located in the bottom, center portion of the screen. Open the “OMP – Ohio Marketplace eCatalog” folder to access the file.



MARKETPLACE
eCatalog

Shop • Procure • Pay

Questions?

Contact Information

Jean Stephenson, OPS Contracts Manager

Jean.Stephenson@das.ohio.gov

614-644-8495

To submit a question, please send a
'high priority' e-mail to

shavonna.neal@das.ohio.gov

Please indicate **"SPUG Question"** in the subject line.



Thank you for your questions and participation!

A Few Reminders...

- This webinar has been recorded and can be viewed in its entirety on our Web site @ www.procure.ohio.gov/PDF/SPUG/SPUG.HTM
- Presentation materials will also be available on our Web site to download
- Live audience: Please remember to complete your evaluation forms before you leave today. Please place them on the registration table.
- Webinar audience: Please e-mail evaluation forms to sinuon.todd@das.ohio.gov

Thanks for attending today!
This concludes today's webinar meeting.
Have a great afternoon!



<http://procure.ohio.gov/PDF/SPUG/SPUG.HTM>