Welcome!

Office of Procurement Services

State Procurement User Group

Some Important Notes…

- If you have **QUESTIONS** for today's presenters:
    Please raise your hand, and staff will bring a microphone to you.

- Please leave your completed evaluation sheets on the registration table at the conclusion of the meeting.

Today's Agenda

- Welcome, Agenda Overview, Staff Announcements
  - Procurement Focus Groups Update
  - Purchasing and Payment Processes in the State of Ohio Training Module
  - MBE Updates
  - Ohio Marketplace Update and Quarterly Account Review
  - State Procurement Compliance Checklists
  - Recruitment
  - Deliverable Based IT Services RFP and IT Staff Augmentation Services RFP
  - Community Rehabilitation Program (CRP) Call Center Services
  - Adjournment

Office of Procurement Services
Staff Announcements

CONGRATULATIONS!!!

Staff Announcements

Ryan Beers, CPPB
Contract Analyst

Medical Team

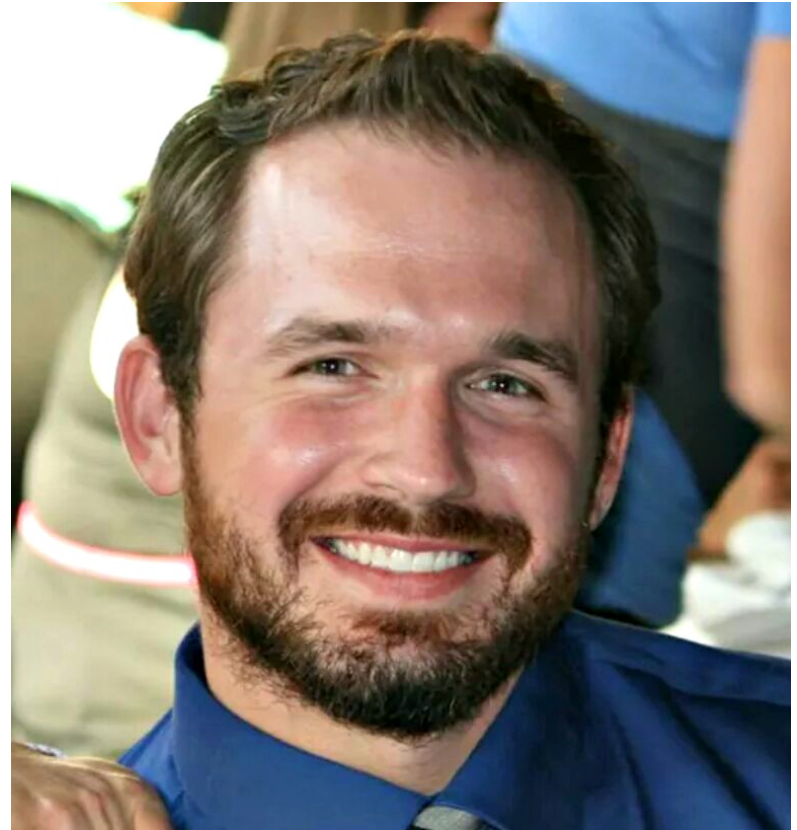# Staff Announcements

Mark Casey
Procurement Manager

Food Team

Staff Announcements

David Colopy, CPPB
Contract Analyst

Medical Team

Staff Announcements

Anita Jones
Contract Analyst

MRO Team

Staff Announcements

Kristen Johnson
Procurement Analyst

Office Supply, Furniture
and CRP Team

Staff Announcements

Jerome Madaris
Intermittent Clerk 3

MRO Team

Staff Announcements

Tonya Prickett, CPPO
Procurement Manager

Minority Business Enterprise
(MBE)

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Staff Announcements

Rob Rounds
Contract Analyst

Fleet Team

Staff Announcements

Kelly Sanders, CPPO, CPPB
Contracts Manager

Staff Announcements

Jesse Scott
State Purchasing Assistant

Procurement Support Team

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Staff Announcements

Jennifer Shaefer, CPPB
Procurement Manager

Fleet Team

Staff Announcements

Dante Talley
Electronic Design Specialist

Procurement Support Team

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Staff Announcements

Sinuon (Sam) Todd
Procurement Analyst

Fleet Team

Procurement Focus Group

Andrew Cochran

DAS GSD Deputy Director's Office

Andrew.Cochran@das.ohio.gov

Procurement Focus Group

- July, 2014:
  - Improvement opportunities identified & Open Forum with Governor's Office

- August, 2014:
  - 4 workgroups formed to improve aspects of procurement

Procurement Workgroups

- Thresholds

- Portal

- Templates

- Training

Purchasing and Payment

Processes

in the

State of Ohio

Training Course

Shavonna Neal, Training Officer
DAS Procurement Services

The Details

- Multi-Agency Effort

- Target Audience

- 7 Modules – www.procure.ohio.gov

- Knowledge Checks

- Future State: ELM

- Spreading the word…

Questions

Shavonna Neal, Training Officer
DAS Office of Procurement Services
Shavonna.neal@das.ohio.gov
(614) 466-4757

Welcome to the Equal Opportunity Division's

MBE/EDGE

Update

Todd McGonigle, EEO Program Manager
DAS Equal Opportunity Division
Todd.McGonigle@das.ohio.gov
(614) 644-7422

Spending Results as of 12/31/2014

MBE
- Fiscal Year 2015 –

Cabinet Level
14.35%
Boards & Commission
13.38%
Statewide Total
14.26% Set-Aside

Agencies using 2nd Tier Language in Contracts

- Department of Administrative Services = $1,760,233

- Department of Transportation = $166,665

- Medicaid = $1,581,874

- EPA = $245,292

Top Five Success Indicators

- Agencies Projected to Meet/Exceed 15% MBE Set-Aside Goal = 49/73

- Certified MBEs – 1279

- MBE Vendors Used = 282 (Tied with FY2014)

- Certification Processing Time = 19 Days (average)

- Number of New Certifications (Never Certified) = 194

Questions

Minority Business Development Division

Outreach/Recruitment

Marlene Chukes

Minority Business Services Coordinator

OhioDAS
General Services Division

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How We Can Help

- Outreach
  - Minority Business Assistance Centers (MBAC)
    - "Fast Track" Certification
    - Procurement Technical Assistance Centers (PTAC)
    - Small Business Development Centers
- Identify other agency's best practices
- Provide support for Outreach events
  - Vendor fairs, workshops, etc.

Minority Business Assistance Centers

Minority Business Assistance Centers

Region 1 (Cleveland/Akron)
Rochelle Beard
(216) 622-0999 ext. 210

Region 2 (Toledo)
David Wood - (419) 243-8191

Region 3 Columbus
Jennifer Averi Frost - (614) 252-8005

Region 4 (Dayton)
RoShawn Winburn - (937) 333-1002

Region 5 (Cincinnati)
Charolette Harris at (513) 751-9900

Region 6 (Youngstown)
William Carter at (330) 746-5681

How You Can Help

- Precisely describe the product or service
  - Estimated contract value
  - Location
- Describe and identify any special requirements that may exists (i.e. insurance, license, bonds, financial arrangements)
- Review contracts for outdated language and/terms
- Inform us if you are working with a vendor who is not certified.
- Sufficient lead time
- Flexibility in your projection plan

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Any questions?

For additional information on

Minority Business Development Division

please contact us at:

(614) 466-5700 or (800) 848-1300 ext. 6-5700

or visit the website at:

www.development.ohio.gov

Marlene Chukes

Minority Business Services Coordinator

(614) 728-0088

Marlene.Chukes@development.ohio.gov

Jean Stephenson, CPPO, C.P.M., A.P.P.
State Procurement Contracts Manager
Business Lead, Ohio Marketplace eCatalog

Today's Agenda:

- Catalog enablement update
- Agency onboarding update
- SciQuest quarterly account review
  - User Analysis
  - Spend Analysis
  - Supplier Analysis

Catalog enablement status

- Currently @ 122
- State Surplus catalog enabled on 1/26/2015
- OPI working with SciQuest on hosted catalog
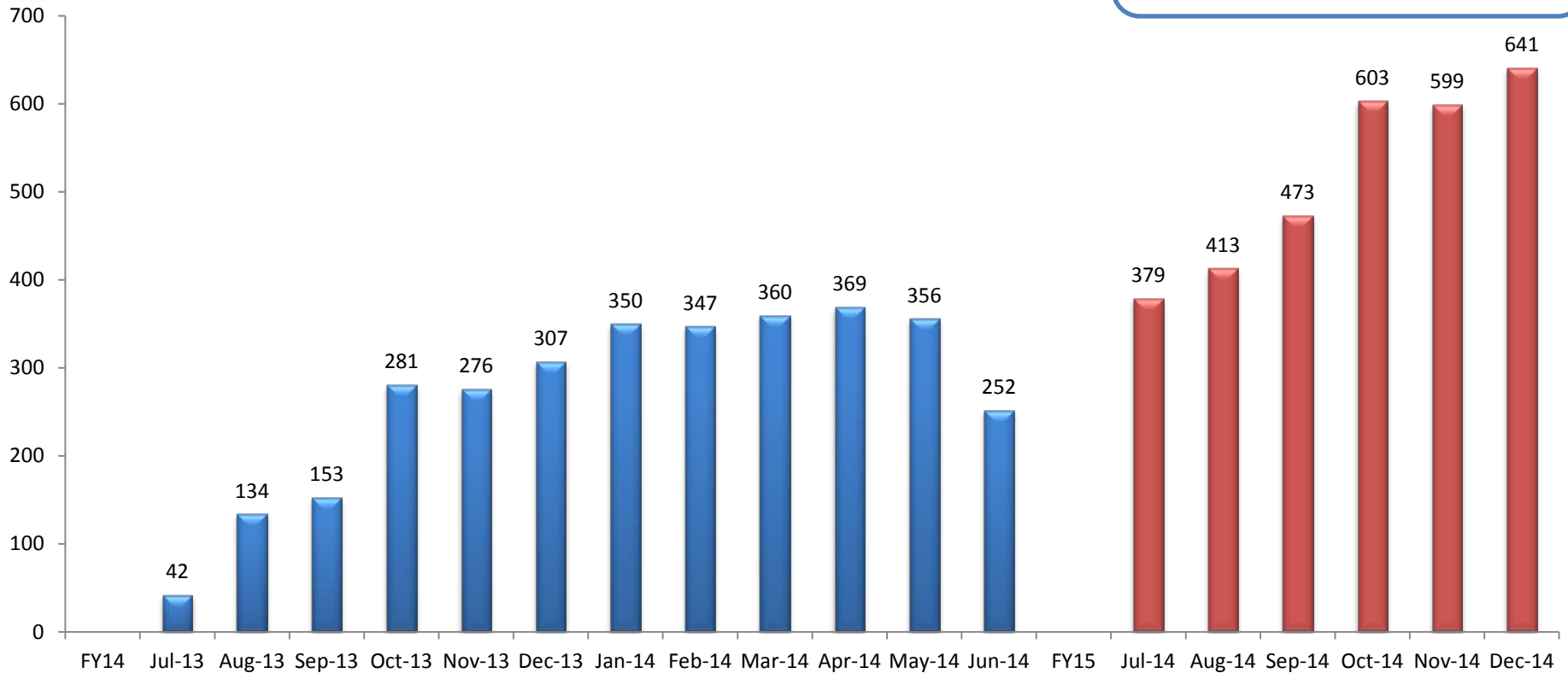
Agency onboarding status

- Boards and Commissions

• USER ANALYSIS

- Unique Users per Month
- User Sessions & Searches
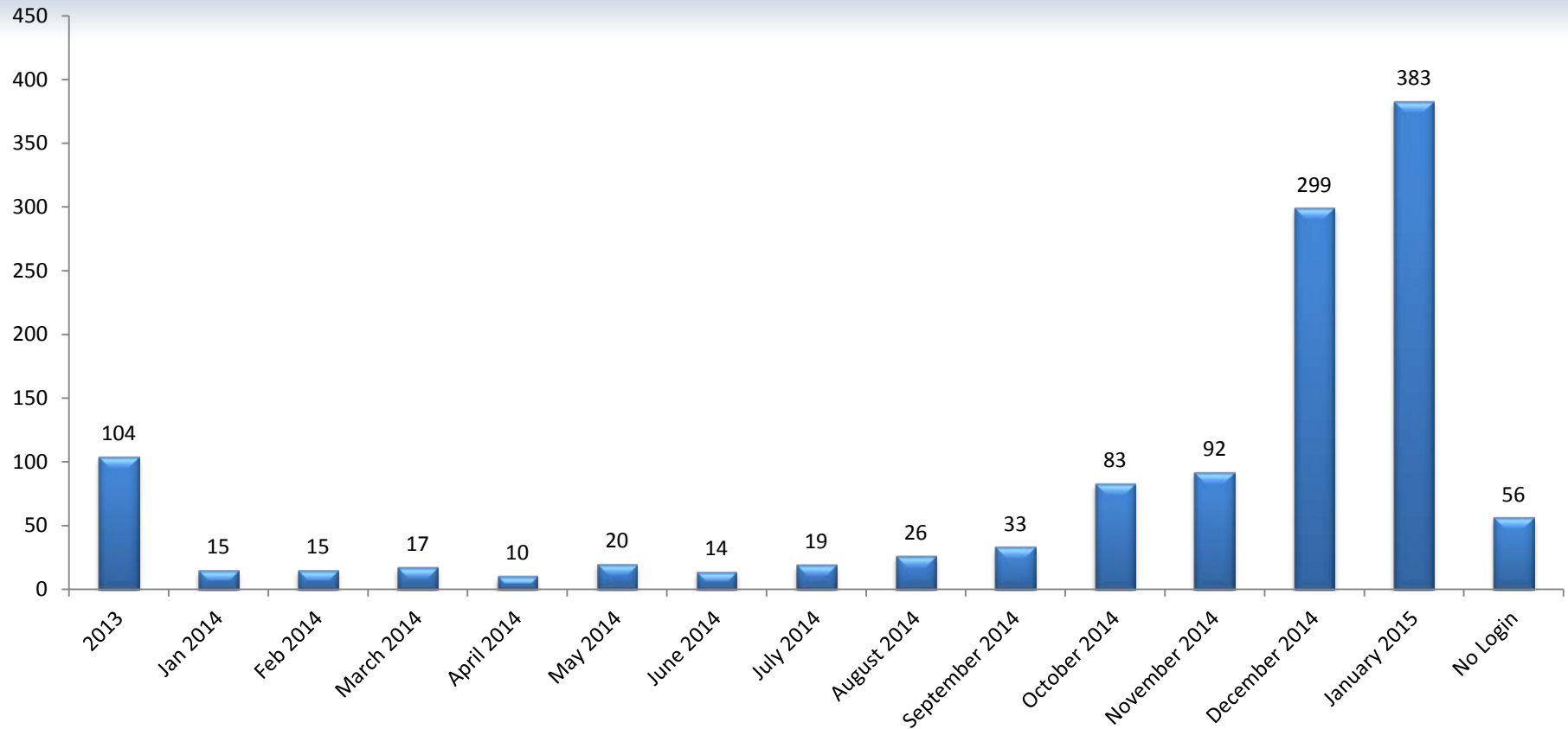- Product Search Method
- Add to Cart Summary
- Active User last Login

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Unique users by month

As of 1/9/2015, 1,174 Total Active Users in the system up from 789 in August.

Chart: Unique users by month

Month	Users
FY14	
Jul-13	42
Aug-13	134
Sep-13	153
Oct-13	281
Nov-13	276
Dec-13	307
Jan-14	350
Feb-14	347
Mar-14	360
Apr-14	369
May-14	356
Jun-14	252
FY15	
Jul-14	379
Aug-14	413
Sep-14	473
Oct-14	603
Nov-14	599
Dec-14	641

Unique users shows a steady increase in FY2015 with an average of 518 Users/Mo compared to 199 Jul-Dec FY2014 and 269 for all FY2014. Unique users hit a new high with 641 in Dec 2014.

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A Unique User is defined as the distinct count of users with a page view during the time period. The data shown in the graph represents the total unique users for each month during the selected period.

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Active Users' Last Login

73% of active users have logged into the application since October 2014.

User sessions & searches

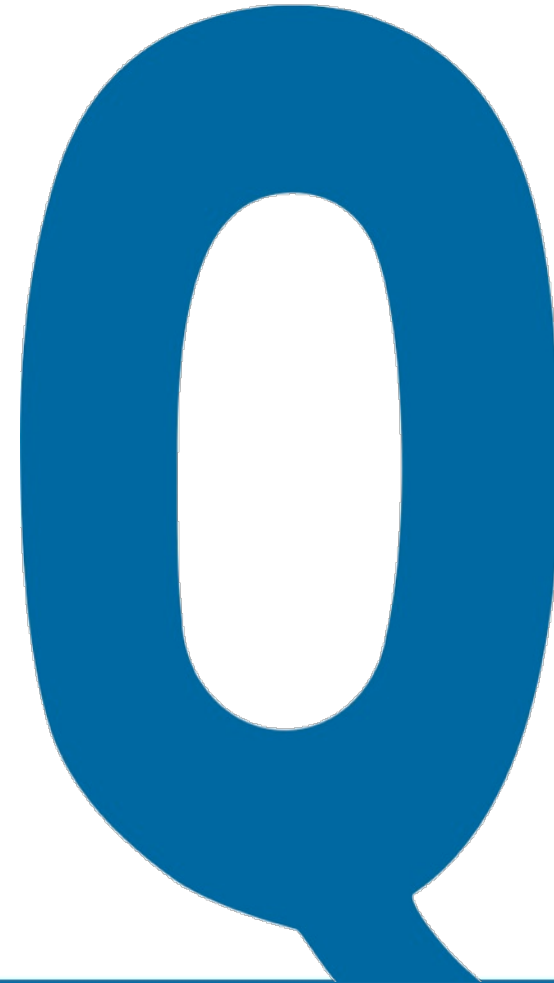|	FY14	Jul-13	Aug-13	Sep-13	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	May-14	Jun-14	FY15	Jul-14	Aug-14	Sep-14	Oct-14	Nov-14	Dec-14
# of Sessions		434	1339	1538	2624	3326	3489	4068	3797	3762	3838	3517	1983		4288	4487	4772	6261	5195	6058
# of Searches		262	1350	1702	2905	4891	3463	4766	4207	5012	5331	5285	1691		6159	15994	17251	28181	21522	21612

■ # of Sessions   ■ # of Searches
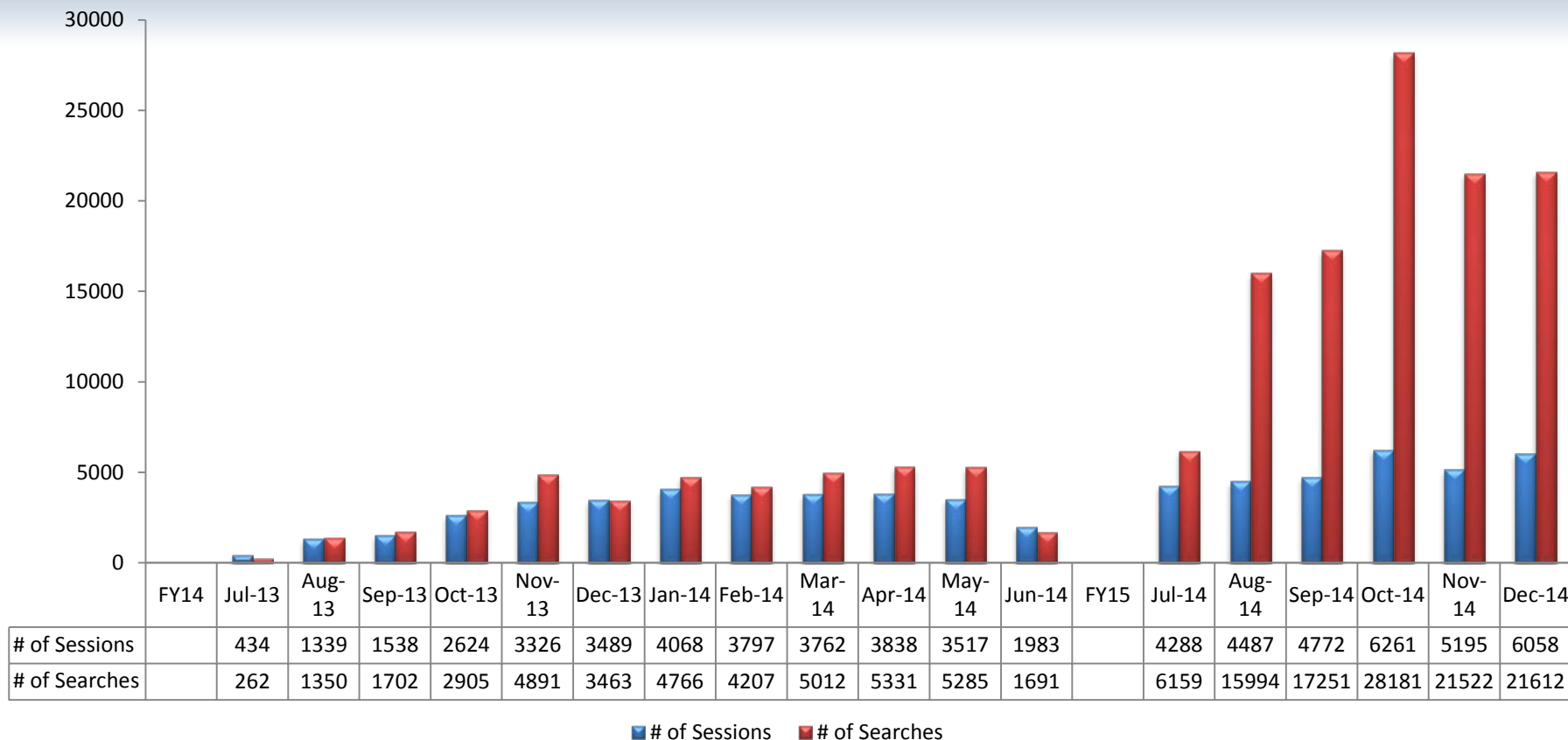
User Sessions & Searches continue to increase in FY2015.

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• SPEND ANALYSIS

- Spend Summary
- Order Spend
  - By Agency
- Order Lines/Count
  - By Agency

Spend summary

Jul 1, 2014 - Jan 11, 2015 compared to Jul 1, 2013 - Jan 11, 2014

■ Catalog Spend (Selected) ■ Non-Catalog Spend (Selected) ■ Catalog Spend (Prior) ■ Non-Catalog Spend (Prior) ■ PO Count (Selected) ■ PO Count (Prior)
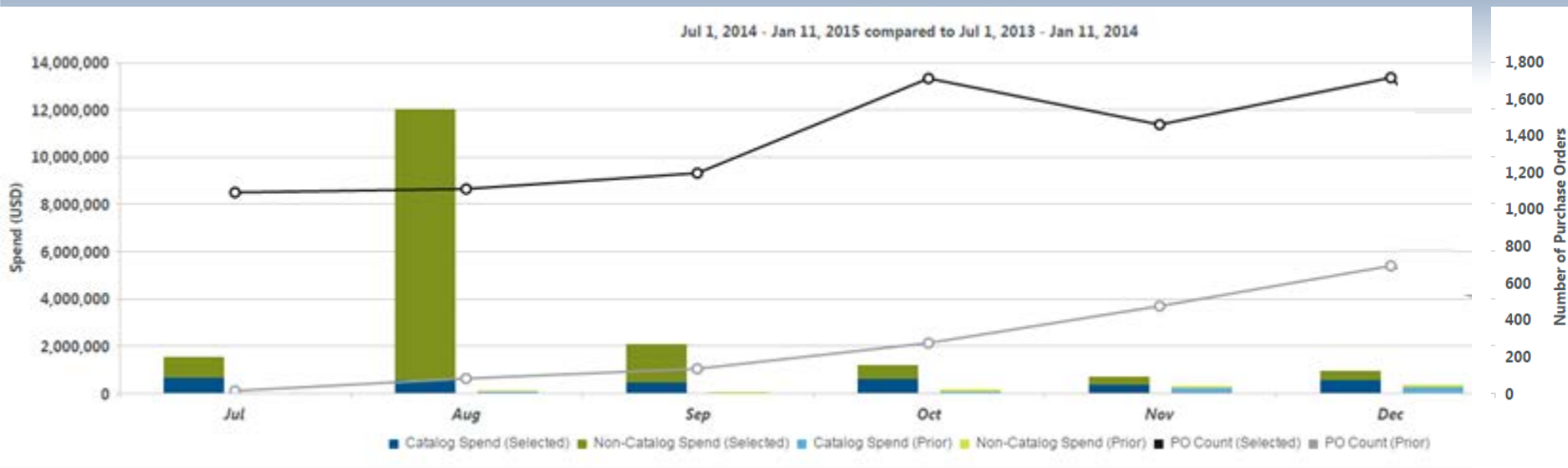
	FY 2014	FY 2014 July - December	FY 2015 July - December
Dollars	$3,725,749	$915,959	$18,388,702
Order Lines	31,293	8,547	28,841
Order Count	6,366	1,643	8,277

Order Spend Volume
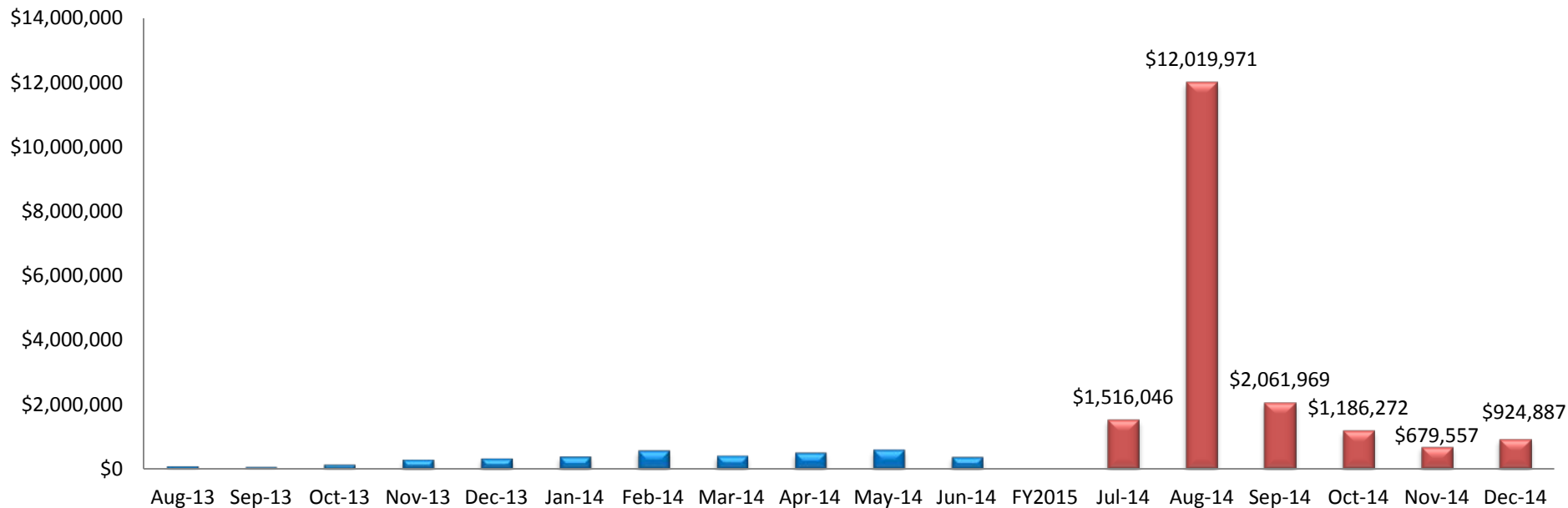
	July	August	September	October	November	December	January	February	March	April	May	June
FY2014		$94,199	$69,648	$131,187	$295,404	$325,522	$384,512	$562,976	$404,606	$495,821	$593,860	$368,014
FY2015	$1,516,046	$12,019,971	$2,061,969	$1,186,272	$679,557	$924,887						

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Order Count and Lines

	FY 2014	FY2014 Jul-Dec	FY2015 Jul-Dec
Lines	31,293	8,547	28,841
Count	6,366	1,643	8,277

	FY14	Aug-13	Sep-13	Oct-13	Nov-13	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	May-14	Jun-14	FY15	Jul-14	Aug-14	Sep-14	Oct-14	Nov-14	Dec-14
PO Lines		290	635	1,482	2,715	3,425	4,609	3,597	3,971	4,169	3,859	2,541		5,451	3,281	3,791	5,795	5,179	5,344
POs		78	131	271	472	691	861	730	829	903	850	550		1,090	1,110	1,194	1,711	1,458	1,714

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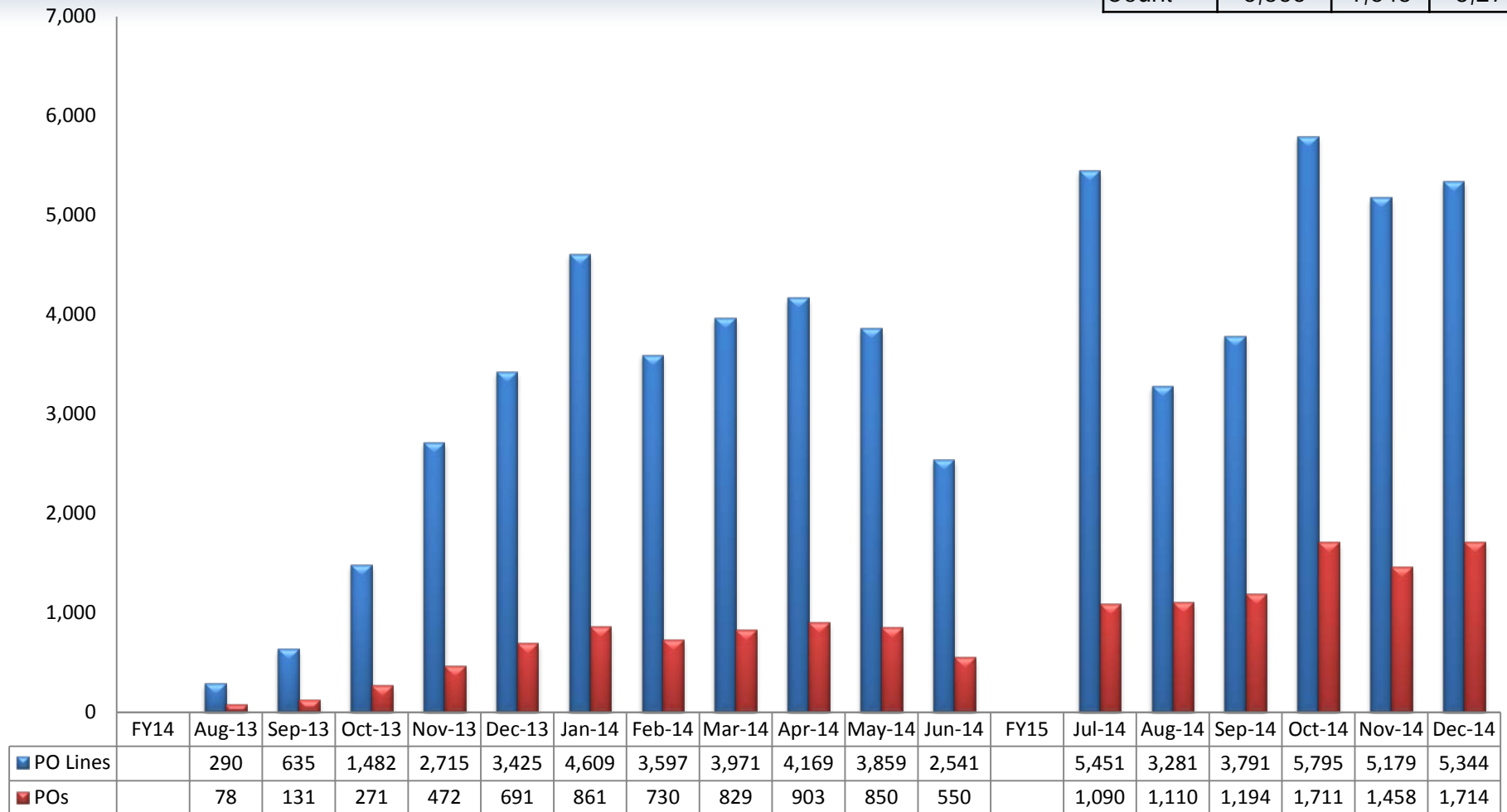
Order Spend Volume by Agency

Agency	Jul-14	Aug-14	Sep-14	Oct-14	Nov-14	Dec-14	Total
Dept of Rehab & Corrections	$731,101	$11,461,634	$1,364,323	$481,107	$315,867	$298,893	$14,652,925
Dept of Public Safety	$296,093	$304,505	$212,091	$254,001	$115,239	$136,480	$1,318,407
Dept of Health	$54,927	$54,591	$260,518	$48,950	$35,159	$171,290	$625,434
Bur of Workers' Compensation	$131,531	$128,169	$67,414	$153,785	$35,477	$59,070	$575,446
Dept of Admin Services	$189,920	$40,482	$100,423	$88,126	$22,882	$51,482	$493,314
Dept of Mental Health	$99,023	$9,935	$11,351	$23,700	$10,729	$29,804	$184,542
Ohio Dept of Natural Resources	$10,367	$16,405	$27,219	$42,499	$38,256	$34,463	$169,208
Dept of Youth Services				$35,249	$14,968	$30,152	$80,369
Development Services Agency					$43,419	$23,428	$66,847
Developmental Disabilities				$13,581	$15,834	$22,329	$51,744
Taxation			$2,853	$15,008	$8,620	$6,583	$33,065
Ohio Department of Commerce						$23,146	$23,146
Public Utilities Commission	$231	$3,294	$6,726	$3,632	$5,437	$3,444	$22,764
Public Defender Commission				$4,695	$7,838	$7,274	$19,808
Dept of Aging	$1,649	$598	$6,234	$2,118	$2,537	$489	$13,623
Lottery Commission				$5,463	$746	$2,605	$8,814
Board of Pharmacy			$1,212	$4,595	$654	$1,665	$8,126
Board of Regents				$1,992	$1,207	$3,935	$7,134
Office of Budget & Mgmt	$1,206	$359	$1,605	$2,833		$357	$6,360
Department of Veterans Service				$4,357		$1,907	$6,264
Environmental Protection Agcy						$5,999	$5,999
Dept of Insurance				$498	$1,700	$2,539	$4,738
Medical Board				$32	$1,856	$2,414	$4,303
Medicaid						$2,493	$2,493
Civil Rights Commission					$703	$1,334	$2,037
Adjutant General						$1,313	$1,313
Rehab Services Commission				$51			$51
Industrial Commission							$0

Order Lines by Agency

Agency	Jul-14	Aug-14	Sep-14	Oct-14	Nov-14	Dec-14	Total
Dept of Public Safety	3,485	1,832	2,012	2,471	2,174	2,111	14,085
Dept of Rehab & Corrections	1,308	757	842	1,122	869	850	5,748
Ohio Dept of Natural Resources	169	260	387	909	781	801	3,307
Dept of Health	108	100	138	214	205	330	1,095
Dept of Admin Services	105	173	95	189	214	167	943
Dept of Mental Health	131	89	121	130	163	176	810
Dept of Youth Services				309	239	138	686
Dept of Aging	57	6	38	66	81	41	289
Public Utilities Commission	19	25	55	15	111	50	275
Developmental Disabilities				74	68	116	258
Bur of Workers' Compensation	52	34	48	38	37	49	258
Public Defender Commission				31	55	48	134
Board of Regents				64	30	40	134
Board of Pharmacy			16	45	33	11	105
Office of Budget & Mgmt	17	5	26	41		10	99
Development Services Agency					10	86	96
Lottery Commission				49	5	28	82
Environmental Protection Agcy						76	76
Medical Board				2	20	42	64
Ohio Department of Commerce						53	53
Dept of Insurance				7	22	23	52
Taxation			13	8	15	14	50
Civil Rights Commission					23	23	46
Department of Veterans Service				8		24	32
Medicaid						25	25
Adjutant General						12	12
Rehab Services Commission				3			3

FY15 Total
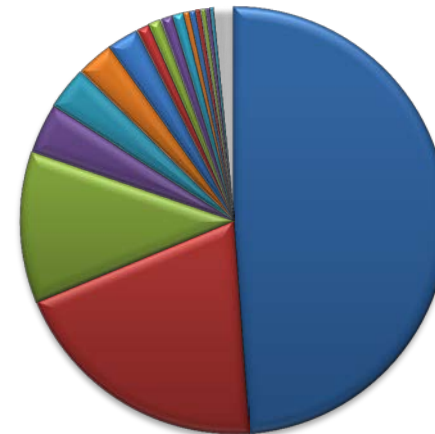
- Dept of Public Safety
- Dept of Rehab & Corrections
- Ohio Dept of Natural Resources
- Dept of Health
- Dept of Admin Services
- Dept of Mental Health
- Dept of Youth Services
- Dept of Aging

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Order Summary by Agency

Agency	FY 2014			FY 2015		
	Dollars	Lines	Count	Dollars	Lines	Count
Dept of Rehab & Corrections	$1,698,809	9,488	1,931	$14,652,925	5,748	1,625
Dept of Public Safety	$1,406,709	17,172	3,465	$1,318,407	14,085	3,748
Dept of Mental Health	$213,463	1,467	371	$184,542	810	289
Dept of Health	$184,498	972	178	$625,434	1,095	349
Bur of Workers' Compensation	$95,146	172	27	$575,446	258	70
Ohio Dept of Natural Resources	$58,840	1,018	182	$169,208	3,307	1,062
Dept of Admin Services	$51,150	708	153	$493,314	943	311
Office of Budget & Mgmt	$7,927	141	32	$6,360	99	24
Public Utilities Commission	$7,885	107	20	$22,764	275	67
Dept of Aging	$1,320	48	7	$13,623	289	52
Dept of Youth Services				$80,369	686	188
Development Services Agency				$66,847	96	46
Developmental Disabilities				$51,744	258	140
Taxation				$33,065	50	39

Agency	FY 2014			FY 2015		
	Dollars	Lines	Count	Dollars	Lines	Count
Ohio Department of Commerce				$23,146	53	14
Public Defender Commission				$19,808	134	44
Lottery Commission				$8,814	82	12
Board of Pharmacy				$8,126	105	30
Board of Regents				$7,134	134	45
Department of Veterans Service				$6,264	32	9
Environmental Protection Agcy				$5,999	76	24
Dept of Insurance				$4,738	52	12
Medical Board				$4,303	64	41
Medicaid				$2,493	25	9
Civil Rights Commission				$2,037	46	20
Adjutant General				$1,313	12	2
*Price Adjuster				$430	24	2
Rehab Services Commission				$51	3	3
Grand Total	$3,725,749	31,293	6,366	$18,388,702	28,841	8,277

Cycle Time

Cycle Time FY2014
6,364 Documents

- 0 Days (85.9%)
- 1 Day (6.5%)
- 2-5 Days (6.0%)
- 6-10 Days (1.2%)
- 11-29 Days (0.2%)
- 30+ Days (0.1%)

30+ Days	7
11-29 Days	13
6-10 Days	79
2-5 Days	383
1 Day	416
0 Days	5466
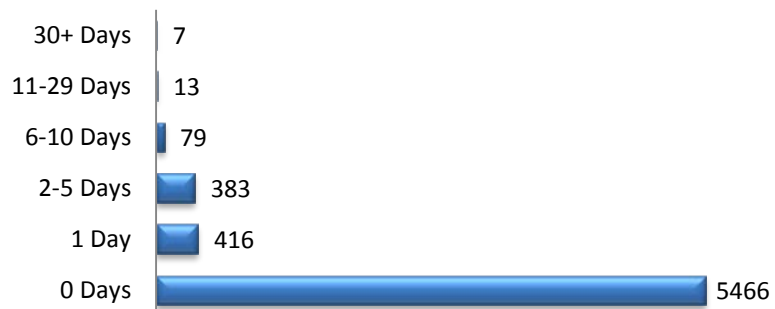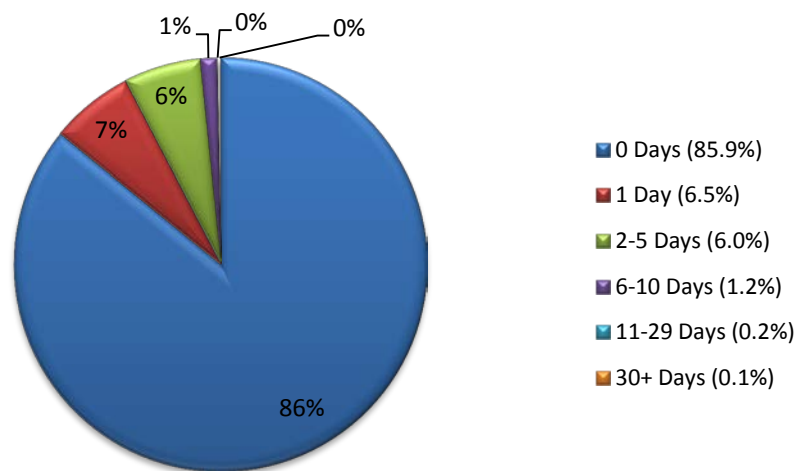
Cycle Time FY2015
8,862 Documents
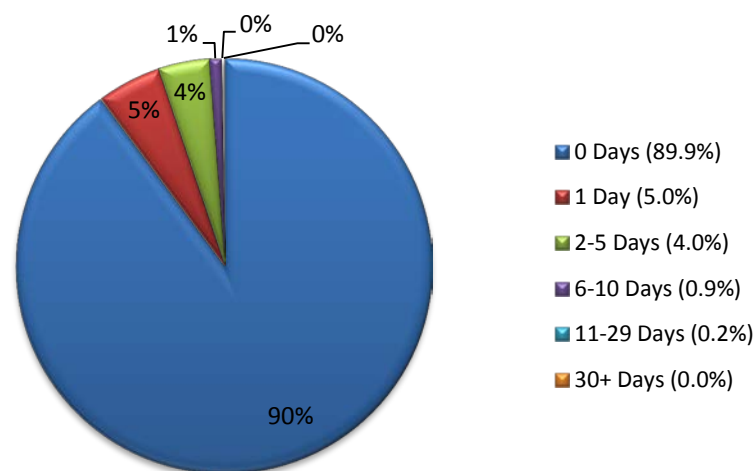
- 0 Days (89.9%)
- 1 Day (5.0%)
- 2-5 Days (4.0%)
- 6-10 Days (0.9%)
- 11-29 Days (0.2%)
- 30+ Days (0.0%)

30+ Days	4
11-29 Days	19
6-10 Days	76
2-5 Days	354
1 Day	446
0 Days	7963

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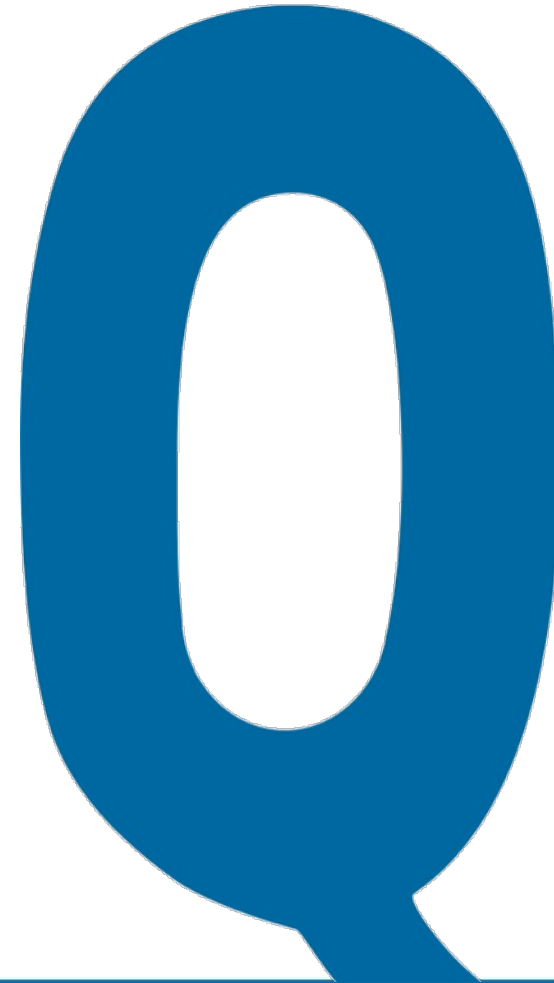
Enabled Supplier Spend

Supplier ID	Supplier Name	FY 2015 Dollars	FY2014 Dollars	FY15 Lines	F014 Lines	FY 2015 Count	FY2014 Count
16081730	BoLinds Solutions Services, Inc.	$1,495,021		13,886		3,470	
15886518/15461963	Superior Industrial Supply & Services, Inc.	$562,539	$458,996	2,576	3,724	750	677
15306314	GBEX, LLC	$326,083		5,061		1,502	
13368814	Direct Resource, Inc.	$282,566	$375,240	478	959	243	317
15486206	D. Johnson Enterprises	$151,778	$86,987	759	511	316	125
15886515/15461071	MRO Express, LLC.	$135,097	$102,223	744	406	346	124
15886517/15498094	Reliable Products and Services	$64,064	$61,376	393	535	174	120
15461023	Reico Supply	$38,109	$24,614	172	111	96	55
3901	VWR INTERNATIONAL INC	$32,105	$4,572	84	27	44	15
125769	WW GRAINGER INC	$13,111	$21,956	120	173	65	67
3825401	FISHER SCIENTIFIC COMPANY	$12,778	$35,650	42	84	22	29
15461021	YARO SUPPLY COMPANY	$9,968	$8,587	106	54	75	18
4070444	FASTENAL CO	$9,371	$5,412	92	22	45	10
15461066	Quality Building Supplies for Industry, Inc	$8,976	$16,414	69	48	49	21
4068910	SEXAUER	$7,461	$1,244	69	10	37	4
125686	MSC INDUSTRIAL SUPPLY	$6,573	$3,113	60	70	41	15
15429463	Snap-On		$295		4		3

Top 20 Suppliers by Dollars

Supplier ID	Supplier Name	FY 2015 Dollars	FY2014 Dollars	FY15 Lines	F014 Lines	FY 2015 Count	FY2014 Count
15623557	ATC HEALTHCARE SERVICES INC	$11,894,639		10		3	
16081730	BoLinds Solutions Services, Inc.	$1,495,021		13,886		3,470	
15783367	Diversity Search Group, LLC	$1,182,829	$180,283	119	31	113	31
15886518/15461963	Superior Industrial Supply & Services, Inc.	$562,539	$458,996	2,576	3,724	750	677
15306314	GBEX, LLC	$326,083		5,061		1,502	
13368814	Direct Resource, Inc.	$282,566	$375,240	478	959	243	317
15792061	ROGER L ELLIOTT	$256,764	$46,893	443	116	117	32
19892	PERKINELMER HEALTH SCIENCES INC	$247,090	$49,347	1	2	1	2
15780380	Aryes Staffing	$222,877	$24,871	26	6	25	6
15623664	Medical Staffing Network Healthcare, LLC	$206,447	$7,197	6	1	6	1
12844251	AEROTEK INC	$161,148		18		18	
15794184	GOODWILL INDUSTRIES OF AKRON OHIO INC	$158,103	$48,034	76	23	56	14
15486206	D. Johnson Enterprises	$151,778	$86,987	759	511	316	125
15949820	Net PAC International LLC	$137,672	$0	49	0	34	0
15886515/15461071	MRO Express, LLC.	$135,097	$102,223	744	406	346	124
15792565	ALLSTATE INDUSTRIAL INC	$106,893	$59,071	141	104	42	21
15623598	MAXIM STAFFING SOLUTIONS	$103,040	$64,274	6	4	6	4
15623662	Wise Medical Staffing, Inc.	$99,990	$74,995	1	1	1	1
15942770	EXPRESS MINI MART INC	$99,960		1		1	
16205708	Cross Country Staffing	$91,244		5		5	

Top 20 suppliers by Order Lines

Supplier ID	Supplier Name	FY15 Lines	F014 Lines	FY 2015 Count	FY2014 Count	FY 2015 Dollars	FY2014 Dollars
16081730	BoLinds Solutions Services, Inc.	13,886		3,470		$1,495,021	
15306314	GBEX, LLC	5,061		1,502		$326,083	
15886518/15461963	Superior Industrial Supply & Services, Inc.	2,576	3,724	750	677	$562,539	$458,996
15486206	D. Johnson Enterprises	759	511	316	125	$151,778	$86,987
15886515/15461071	MRO Express, LLC.	744	406	346	124	$135,097	$102,223
15794183	Cincinnati Association for the Blind and Visually Impaired	542	137	256	61	$44,654	$10,838
13368814	Direct Resource, Inc.	478	959	243	317	$282,566	$375,240
15792061	ROGER L ELLIOTT	443	116	117	32	$256,764	$46,893
15886517/15498094	Reliable Products and Services	393	535	174	120	$64,064	$61,376
15793810	LASER CARTRIDGE EXPRESS	238	3	126	3	$77,205	$1,348
15461023	Reico Supply	172	111	96	55	$38,109	$24,614
15792565	ALLSTATE INDUSTRIAL INC	141	104	42	21	$106,893	$59,071
125769	WW GRAINGER INC	120	173	65	67	$13,111	$21,956
15783367	Diversity Search Group, LLC	119	31	113	31	$1,182,829	$180,283
15461021	YARO SUPPLY COMPANY	106	54	75	18	$9,968	$8,587
4070444	FASTENAL CO	92	22	45	10	$9,371	$5,412
3901	VWR INTERNATIONAL INC	84	27	44	15	$32,105	$4,572
15794184	GOODWILL INDUSTRIES OF AKRON OHIO INC	76	23	56	14	$158,103	$48,034
15461066	Quality Building Supplies for Industry, Inc	69	48	49	21	$8,976	$16,414
4068910	SEXAUER	69	10	37	4	$7,461	$1,244

sciQuest

OhioDAS General Services Division

Office of Procurement Services
Service · Support · Solutions

QUESTIONS?

Jean Stephenson, CPPO, C.P.M., A.P.P.

State Procurement Contracts Manager
Business Lead, Ohio Marketplace eCatalog
614-644-8495
Jean.stephenson@das.ohio.gov

STATE PROCUREMENT COMPLIANCE CHECKLISTS

SHAWN S. SMITH, CGFM, COFP
Chief, Finance and Services
PUBLIC UTILITIES COMMISSION OF OHIO
BUSINESS RESOURCES DEPARTMENT

Procurement Compliance Project Team

- April Bagley, OOD – Communications, presentation
- Andy Shaw, DSA – Process mapping
- Shawn Smith (Team Lead), PUCO – Process mapping
- Cat Vandewalle, OBM – Final Report
- A J Ewing, OOD – Web-based tool
- Matt Corlett, DPS –Final report
- Kate Pirwitz, DPS – Web-based tool
- Rosemary Hage, ODH – Communications, presentation

The Problem:
Lots of $
Lots of Requirements

$2,000,000,000 = supplies + services

- Statutes
- Administrative Rules
- Executive Orders
- Policies
- Directives

Existing Procurement Requirements

- ORC Chapter 125
- OAC Chapter 123:5
- Executive Order 2001-12 K
- DAS Procurement Handbook (127 Pages)
- State of Ohio Controlling Board Manual (113 Pages)
- MBE /EDGE Utilization Guidance Manual (76 Pages)
- Payment Card Policy Manual (20 Pages)
- State Printing Manual (60 Pages)
- DAS Directive GD-D-12 (10 Pages)

- DAS Directive GD-D-09 (3 Pages)
- DAS Directive 06-18 (3 Pages)
- DAS Directive 06-19 (3 Pages)
- DAS Policy PUR-001 (7 Pages)
- DAS Policy PUR-002 (3 Pages)
- DAS Policy PUR-003 (10 Pages)
- DAS Policy PUR-004 (5 Pages)
- DAS Policy PUR-005 (5 Pages)
- DAS Policy PUR-006 (4 Pages)
- DAS Policy PUR-015 (5 Pages)

High Risk/High Consequence

High Volume + Complex Requirements = Increased Risk Exposure

⬆ Lawsuits

⬆ Media Attention

⬆ Legislative Inquiry

⬆ Additional Expense

Unfair Expectations?

- Track hundreds of mandates and apply appropriately
- Rules are easy to overlook and misapply
- Too many people involved – requires coordination
- High risk of miscommunication, confusion

How can we help?

- Create process maps for general and IT procurement

- Create state procurement compliance checklist and online tool for utilization by front-line staff at the agency level

- Tools will exhibit all requirements for each purchase type and follow purchase requests through the approval process to assist the CFO in final review

- Checklists can be retained and remain with the historical paperwork to demonstrate compliance during audits

Expected Outcomes

- Conserve resources – Decrease:
  - Requirement for involvement of multiple people at multiple stages
  - Time spent in auxiliary activities (i.e. checking compliance, waiting for feedback, etc.)
  - Overall time spent by individuals
  - Potential for error and need for correction
- Provide recommendations regarding existing processes
- Appropriate for all state agencies
- Mitigate enterprise-wide risk – protect front-line shoppers, procurement officers, CFOs, state agencies, and state government as a whole
- Provide enhancements to state strategic processes (MBE, EDGE, Buy Ohio, etc.)

Ohio**DAS**
General Services Division

DAS Project Sponsorship Team

- Robert Blair, Director

- Rand Howard, Assistant Director

- Christian Selch, Deputy Director, General Services Division

SUBJECT MATTER EXPERT / USER ACCEPTANCE TEAM (SME/UAT)

Gretchen Adkins, DAS

Teresa Brooks, OBM

Alan Childress, DAS

Carol Cook, ODH

Therese Dyer, OOD

Eric Glenn, DAS

Jim Hoover, DAS
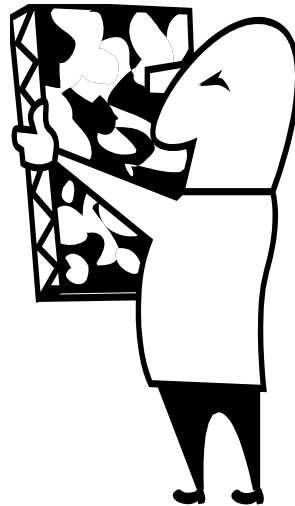
David Jende, DSA

Jenny Jones, OOD

Peter King, OBM

Paul Maragos, ODH

Dan Orr, DAS

Maria Skatzes, PUCO

Chuck Stang, DAS

Project Goals

- Identify and map procurement requirements for general and IT purchase types

- Develop procurement compliance checklists for use by front line agency staff and CFOs

- Develop web-based tools to guide users through checklists

- Provide observations of the overall procurement process to DAS

- Prepare presentation, report, and materials for hand-off to DAS for roll-out
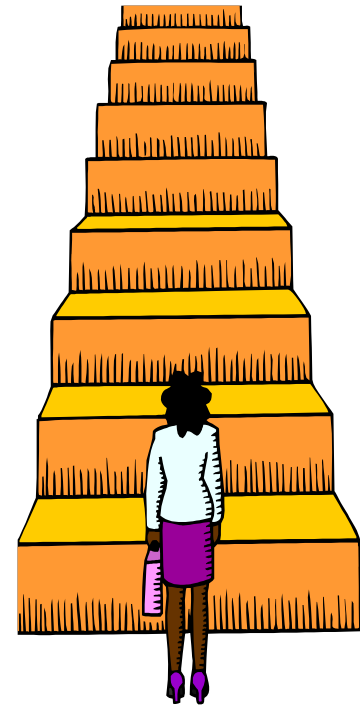
How will this be Accomplished?
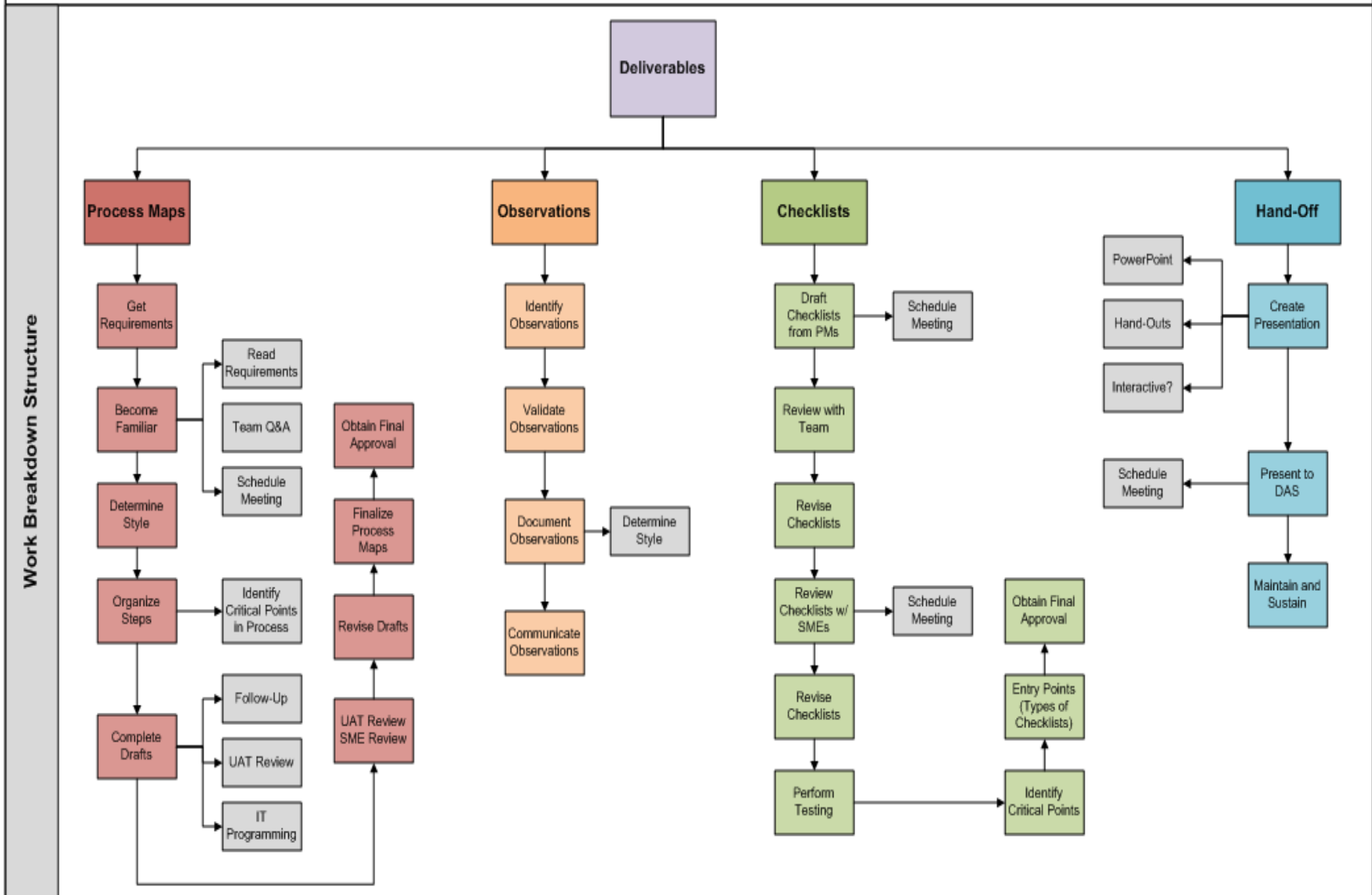
Procurement Process Maps
General and IT

- State General Procurement

- State IT Procurement

State Procurement Process Flow
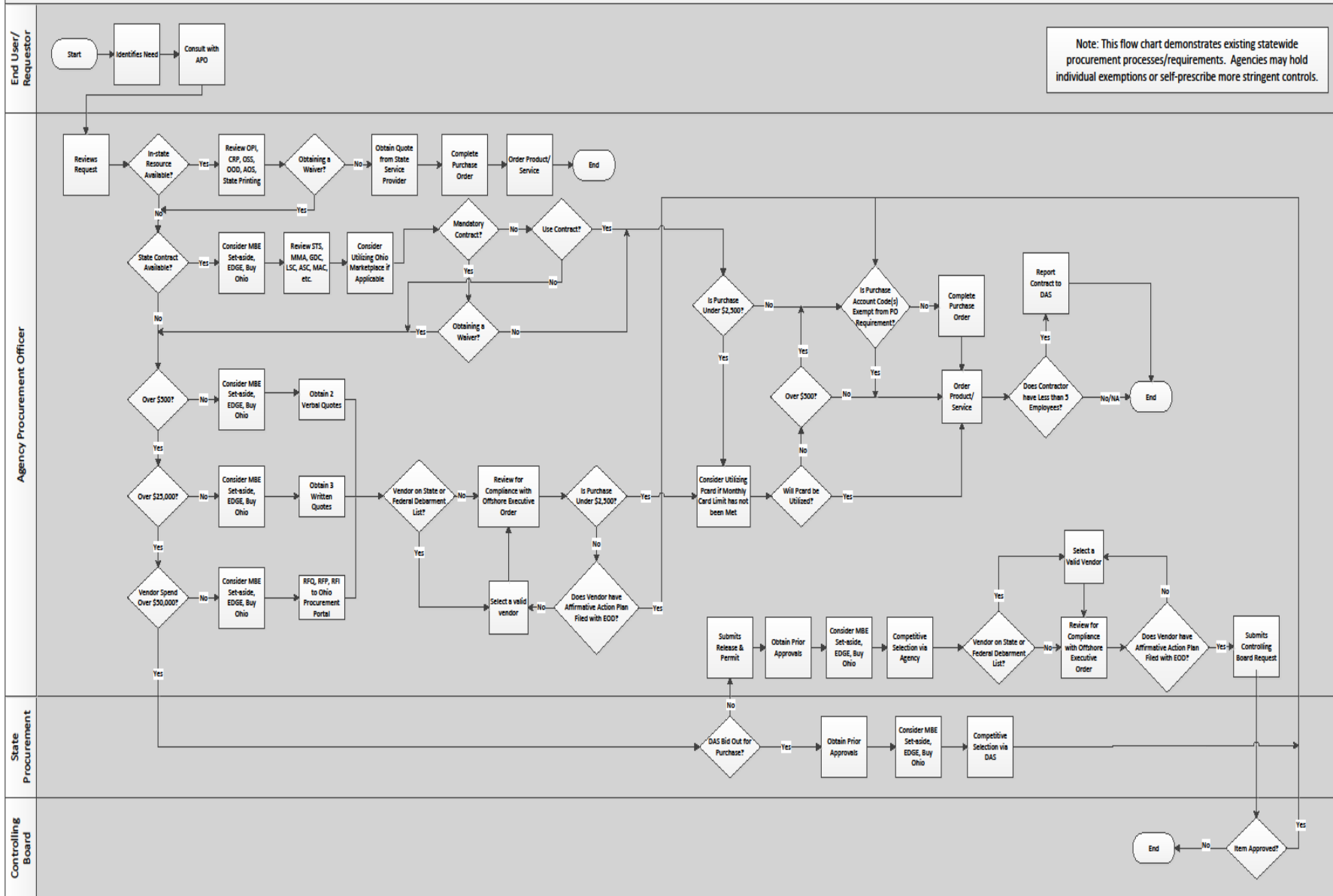
Note: This flow chart demonstrates existing statewide procurement processes/requirements. Agencies may hold individual exemptions or self-prescribe more stringent controls.

IT PROCUREMENT

State IT Procurement Process Flow

Note: This flow chart demonstrates existing statewide procurement processes/requirements. Agencies may hold individual exemptions or self-prescribe more stringent controls. Additionally, agencies should ensure that IT purchases do not conflict with any statewide OIT initiatives.

Procurement Process Checklist

State of Ohio General Procurement Compliance Checklist

Header Information				
Description of Purchase:				
Date:				
Requisition Number:				
Procurement Officer Name:				
Purchase Requested By:				
Disposition (approved/denied/rework):				

Identification of Need				
Item Number	Complete (Y/N/NA)	Requirement	Direction	Notes
1A		Clearly identify the need to procure this product or service.	If the individual requesting this purchase has not clearly identified the need and requirements, return the request to that individual for rework.	
1B		Clear justification for the purchase provided.	If the individual requesting this purchase has not provided a clear justification for the purchase, return the request to that individual for rework.	

Review of In-State Service Provider Availability				
Item Number	Complete (Y/N/NA)	Requirement	Direction	Notes
2A		Is this product or service supplied by an in-state service provider (Ohio Penal Industries, Community Rehabilitation Programs, DMH Office of Support Services , Opportunities for Ohioans with Disabilities, Auditor of State, Treasurer of State, State Printing, OIT Enterprise Services)?	If an in-state resource is available, you must purchase from that entity or obtain a waiver. If the answer to this question is "No," proceed to item 3A.	
2B		If the product or service is from an in-state resource, have you obtained a quote from the state service provider?	List quote amount(s) in the notes section of this row. Attach the quote documentation to this form. Once a quote is obtained and internal approval issued, the order may be finalized with the state entity. If "No", proceed to 2C.	
2C		If the procured product or service is from an in-state resource, are you obtaining a waiver?	If yes, include waiver information in the notes section of this row and attach copy of waiver to this form. If a waiver was granted, proceed to item 3A.	

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Development of Procurement Checklist Web-based tools...

http://ocpm.ood.ohio.gov/aj/

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General Services Division
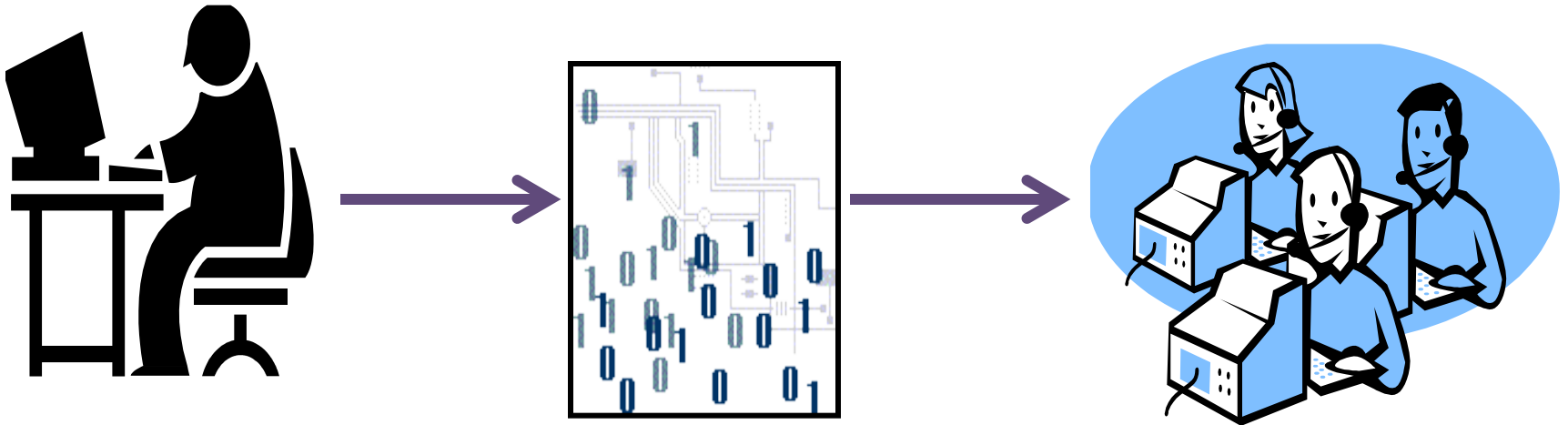
DAS Rollout

- Statewide email to Agency Procurement Officers

- State Procurement User Group Meeting

- OSS CFO Meeting

- Tied to new Procurement Training Rollout

- DAS State Procurement Page

http://procure.ohio.gov/PDF/APO/AgencyProcTools.html

Questions?
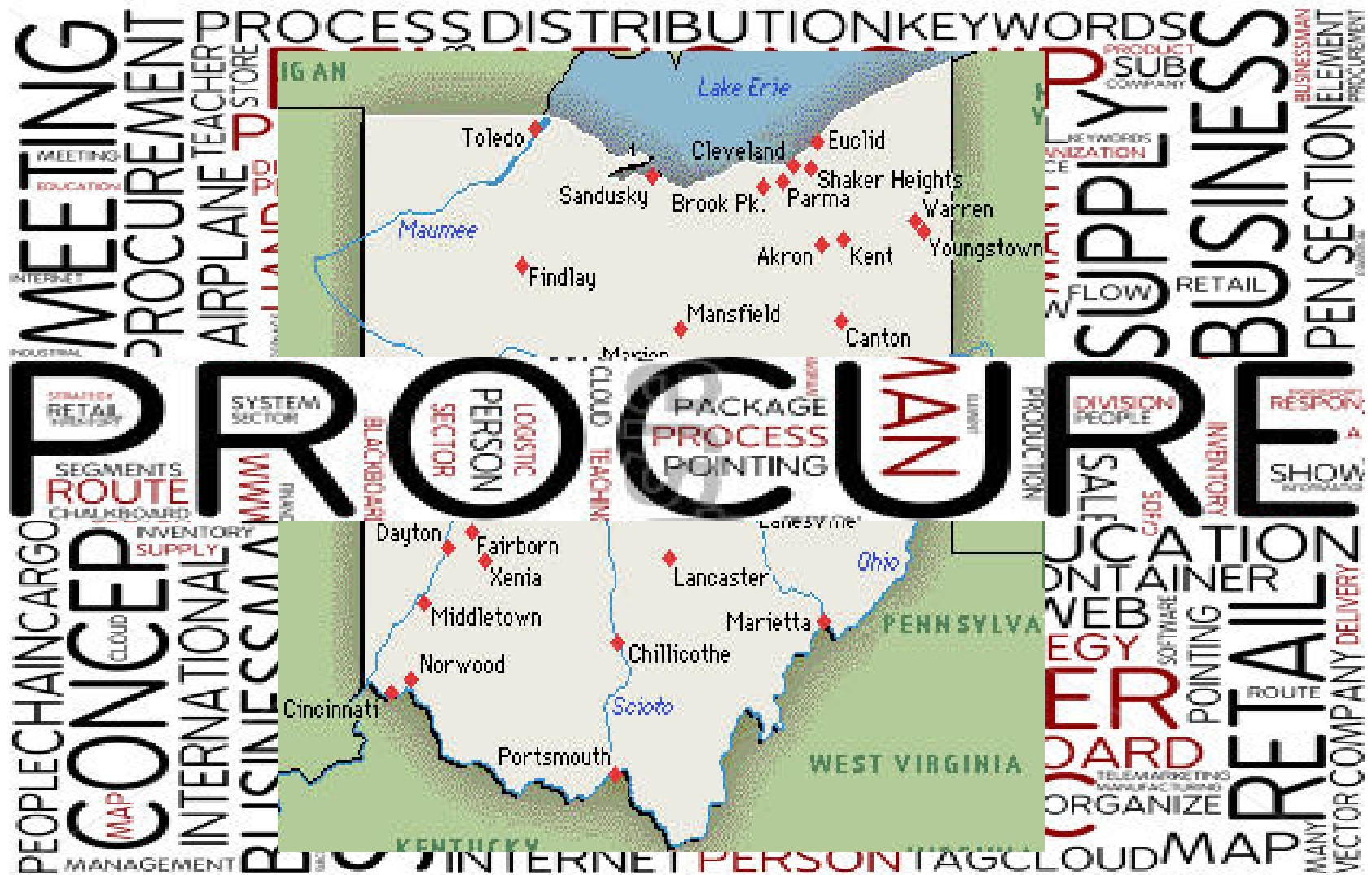
Procurement Updates

IT Staff Augmentation
Deliverable Based IT Services

Dan Orr & Curtis Brooks

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614-728-2884

Contact info:
Curtis.brooks@das.ohio.gov
614-752-96894

IT Staff Augmentation Services

Key Topics

- Brief Current State Overview

- Improving Staff Augmentation in the Future

- Peer States at a Glance

- Schedule

Current State Overview

- Contract established in 2011 by joining a State of Pennsylvania Master Service Provider contract that has been extended to June 30, 2015.

- Through contract with CAI, Inc., staffing companies sign up through open enrollment to compete for posted positions

- Through the service, agencies are able to post into 29 different classifications and levels, and CAI manages several critical element of the fulfillment process.

- CAI is not permitted to provide staffing services directly

- CAI charges 7.67 percent of the posted rates with a .75 percent revenue share

- Contract Spend is $69m; CAI compensation to date is $5m

Improving Staff Augmentation

- Focused on true staff augmentation, with deliverables based projects having a more managed home in DBITS program

- Aligned more closely with CIO review processes, including earlier review of needs and continued commitment to MBE and EDGE goals where possible

- Validate market rate for the role that we want out of the MSP

- Ability to submit both candidates and rates (i.e., the listed rate is a Not to Exceed number)

- Agencies: preferred use, with more specific exception processes

- Option to use the service for non-IT staff augmentation purposes if determined to have merit

- Include MSP Rate for 1st year and separate MSP Rate for Renewals as part of evaluation process

Key Peer State Comparisons

	Ohio	Michigan	Indiana	Virginia
Provider	CAI	Acro	Knowledge Services	CAI
Year Executed	2011 (PA 2005/2010)	2011	2009	2013
Can MSP Place Candidates?	No	No	Yes	Yes
Non-IT available?	No	No	Yes	No
Spend	FY13 $44.7 M	FY13 $12 M	FY14 $69.2 M	FY14 $75.6 M
Rate	7.67%	1.6%	1.87%	8.68%

Takeaway: Competition exists in the marketplace

Schedule

Date	Schedule
Mid October, 2014	Complete Opportunity Assessment
October 2014	Executive Briefings
November 2014	Begin Bid Development
November 2014	Agency Briefings and Engagement (Tech Board & MAC)
Early February 2015	Bid Release
Early March 2015	Bid Response Date
April 2015	Award
April 2015	Transition Start (three month)
July 1, 2015	Go forward system live

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Deliverable Based IT Services

What we are doing?

Pre-qualifying pools of vendors to address 6 different Technology Categories for deliverable-based solutions.

Proactive contracting method of qualification to reduce extensive number of non-compete State Term Schedule contracts.

1. Information Technology Assessment, Planning, and Solicitation Assistance

2. Project Management

3. Application Development and Maintenance Transition Planning

4. Independent Verification and Validation (IV&V) and Quality Assurance

5. Technology Upgrade/Migration and Transformation

6. Business Intelligence and Data Warehouse

Why are we doing this?

- Aligns with IT Procurement re-engineering effort by supporting a quicker time to market for small and medium projects.

- Creates and manages vendor capacity within a common enterprise established model.

- Creates labor pools for areas of deliverable-based projects that are easier for agencies to ensure alignment with enterprise architecture and project standards.

- Creates repeatable method for tracking and reconciling agency project spend and project scope to planning process.

- Supports MBE Strategy and provides opportunity to engage more EDGE, MBE and Ohio based companies.

- Proactive contracting method of qualification to reduce extensive number of non-compete State Term Schedule contracts.

- Migrates away from state term schedule as a primary method for obtaining for deliverable based solutions.

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How are we doing this?

Multiple Award Contract

- Two RFPs will be issued
  - MBE Set-aside
  - Open Market with sheltered MBE set-aside opportunity
- Both RFPs issued the same day.
- Vendors may be considered and prequalified for up to six categories.
- Co-op language will be included – DAS will not be directly involved with the solicitation and award related to co-op contract use.
- The initial term of the contract will be through the end of fiscal year 2015 with up to three additional two-year biennium terms – ending June 30, 2021.
- Periodically re-release for purposes of adding to ODITS contractors and/or technology categories.

Evaluation

- Evaluation team including representatives from the Line of Business Agencies.
- Approximately five to seven evaluators to participate on both RFPs.
- No evaluation of cost to pre-qualify companies prior to award.
- Excessive cost will be addressed during the SOW solicitation process.

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How will this work?

- The Statement of Work (SOW) Solicitation process will provide a collaborative opportunity for OIT and Agency to review.

- Each SOW received will be reviewed by OIT SME areas such as SIM, PSC, ISD as appropriate.

- Each SOW will include specific details pertaining to the project needs. Including but not limited to qualification and experience requirements and other agency-specific requirements.

- OIT will issue SOW solicitations and awards with Agency engagement.

- OIT will work with Agency to determine which pool receives the SOW, and/or whether an RFP or alternative contracting method should be used instead.

- Cost will be evaluated/considered in the Statement of Work Solicitation process.

➢ Faster for Agencies
➢ Supports enterprise priorities
➢ Fits with staffing focus for Enterprise Information Technology

What has already occurred?

- Conducted vendor meetings during the second week of December to present the new procurement approach and to receive comments, concerns and questions.

Monday, December 8th

94 people attended
74 business partners represented

Friday, December 12th

118 people attended
89 business partners represented

Post Session Submissions

15 Comments or Questions Submitted as of 12/18
8 different business partners

➤ Faster for Agencies
➤ Supports enterprise priorities
➤ Fits with staffing focus for Enterprise Information Technology

What has already occurred?

- Reported back to the MAC during December 19th meeting

- Released draft RFP on December 30th for review and comment to vendors
  - Notified 1752 vendors
  - Posted on State Procurement Website
  - Approximately 90 submissions from 38 unique vendors

- Released draft RFP on December 30th for review and comment to State agencies
  - Emailed to 38 Agency Contacts (Multi-Agency CIO Advisory Council)
  - Written feedback from 4 agencies as of 1/21/15

- Sought State agency representatives to participate on the proposal evaluation team.

➢ Faster for Agencies
➢ Supports enterprise priorities
➢ Fits with staffing focus for Enterprise Information Technology

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Next Steps

- Complete Review of Comments Received from Vendor Community & Agencies

- Incorporate Appropriate Revisions and Additions

- Finalize RFPs

- Release both MBE Set-Aside & Open Market RFPs by 1/31/15

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QUESTIONS?

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Office of Information Technology
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Curtis Brooks, CTPE
IT Procurement Supervisor
Department of Administrative Services
Office of Information Technology
Enterprise IT Contracting
Category Management
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Thank you!

Community Rehabilitation Program (CRP)
Call Center Services

Wayne McCulty, CPPO
DAS State Procurement Administrator

Ron Rowland, MBA,CPPO
DAS Procurement Manager

Cleveland Sight Center - Call Center Overview
February 2015
www.ohiocontactcenter.com

"A Quality Call Begins with Quality People"

Agents + Platform = Results

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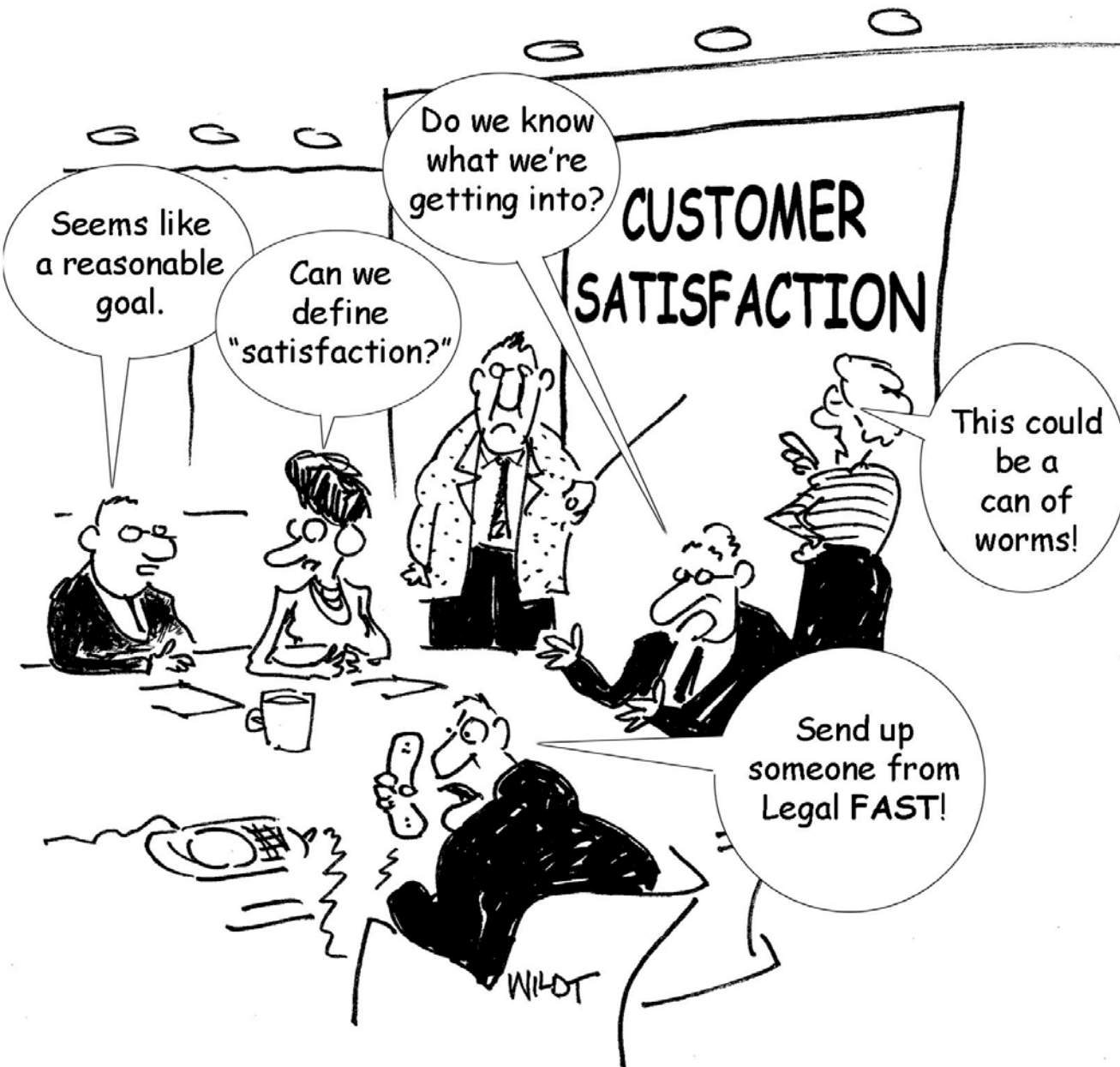
Call Center Operations

Staffed 365 days a year – including holidays

45 Customer Service Representatives
4 Team Leads and 4 Quality Analysts

Agency was founded in 19096. Currently have
$92m in assets with an annual budget of $8m.
$1.5m annual contracts for call center services

"A Quality Call Begins with Quality People"

Agent Overview

- Longest Tenure – 4 years 5 months

- Average Tenure – 1 year 6 months

- Annual Turnover - 9%

  Less than half the industry average of 51%**

- Offer PTO, Medical, Vision, Dental & 401k

- Assistive Technology is the enabler
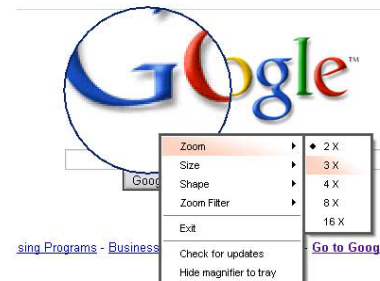
Magnification and Color Enhancements
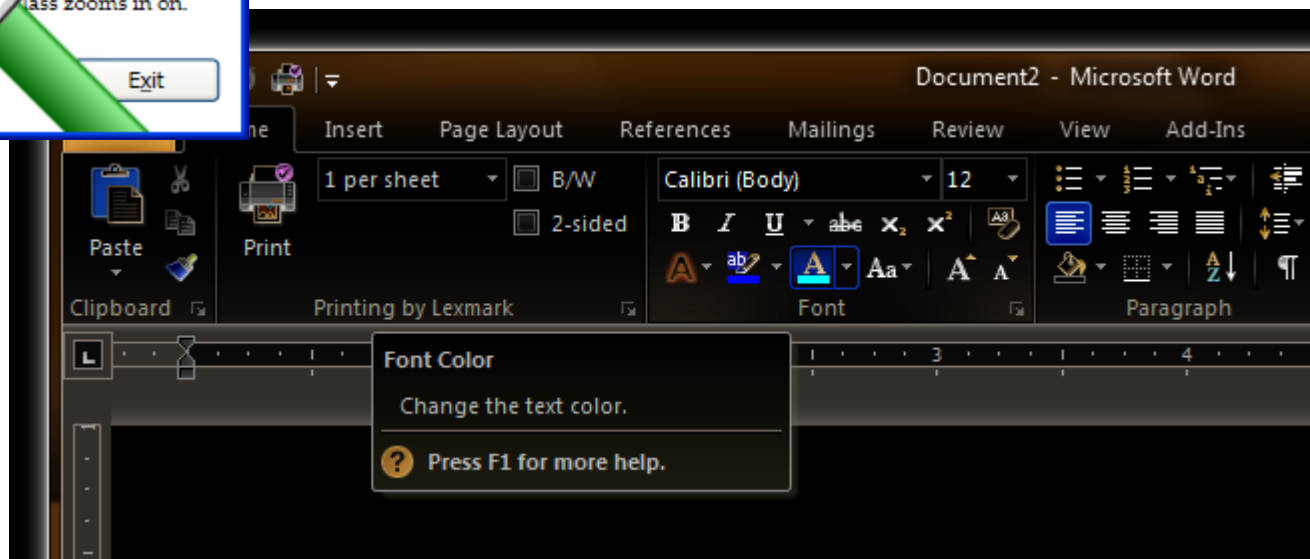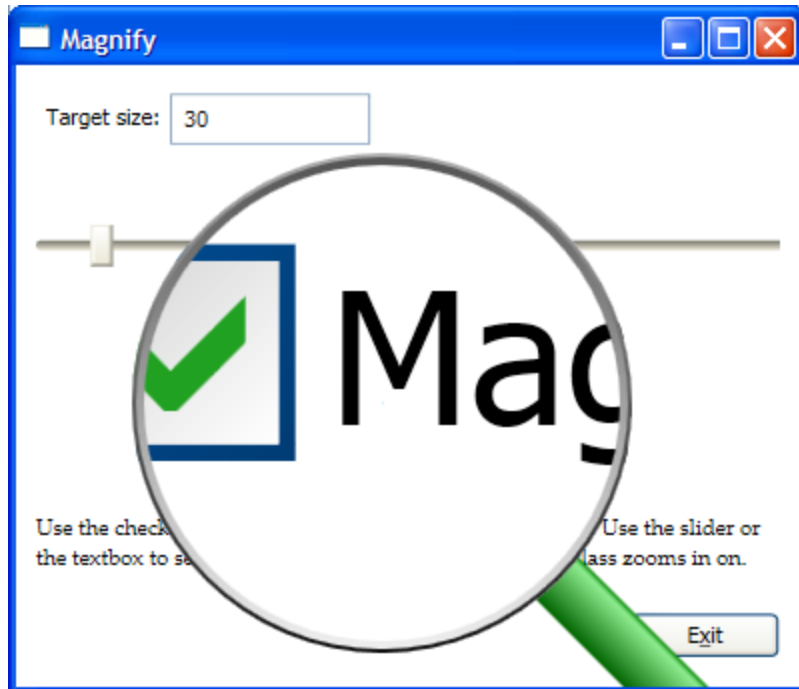
Screen Reader
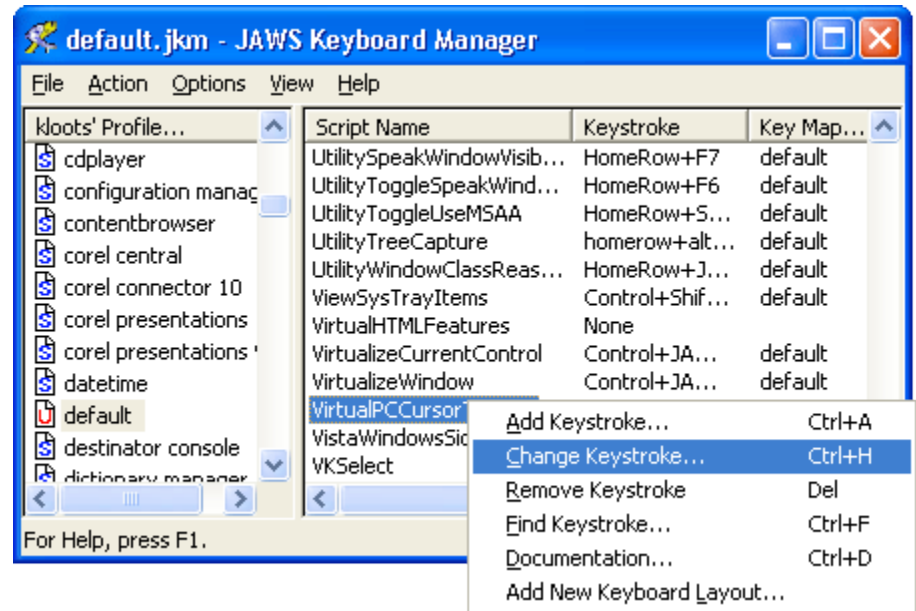
Typical View of a Webpage

How JAWS Interprets the Webpage

skip to main content State Agencies | Online Services

[Image: Ohio.gov]
Search:
[Image: RSS icon]   [Image: Flickr icon]   [Image: YouTube icon]   [Image: Twitter icon]   [Image: Facebook icon]
MENU

- **Living in Ohio**
    - Children
    - Consumer Protection
    - Environment
    - Health
    - Housing
    - Justice & Law
    - Money & Finance
    - Motor Vehicles, Aircraft & Watercraft
    - Public Safety
    - Seniors
    - Taxes
    - Veterans
    - Vital Records
    - Voting & Elections
    - Weather

    FEATURES

File your taxes electronically
Get a refund fast or pay by either electronic check or credit card

Check your refund status
Check online or call the automated refund hotline at 1-800-282-1784

Search for missing money
An online treasure hunt from the Division of Unclaimed Funds

- **Education**
    - Adult Education & Career Training
    - Colleges & Universities
    - Day Care & Pre-K

Technology Platform

CISCO based Interactive Intelligence Platform customized by InfoCision

Features
- Computer Telephony Integration
- In-bound & Out-bound
- Interactive Voice Response
- Automation
  - CASS validation, Reverse White Pages, Order Merge, FTP & E-mail
- Digital Call Recording
- Real-Time Reporting
- Systematic Quality Assurance
- Work At Home
- PCI and HIPAA Compliant

800-Buckeye

Call Center Partners of Cleveland Sight Center

"A Quality Call Begins with Quality People"

Agents + **Platform** = **Results**

Call Center Terminology

- Abandon Rate – The % who call, hang-up and are not served
- Hold Time – The amount of time between when a caller requests to speak to someone and they actually speak to someone
- Quality Score – The score for the call as measured on the approved Scorecard. A high score indicates adherence to procedures and good customer service
- ACD – Automatic Call Distribution. This is the telecommunications system that routes calls to the agents
- IVR – An acronym for Interactive Voice Response. This is the automated or pre-recorded portion of the call.
- Level 1 – The topics and types of calls handled by a call center agent
- Level 2 & 3 – The topics and types of calls handled by CJFS
- Script – The procedures the agent uses to serve the callers.

Date Range: 1/1/2014 - 12/31/2014

Filter: NONE

Last Updated Date: 1/14/2015 5:26:17 PM

Month	Total Calls	Total Closed	Total IVR	Total Shorts	Total Calls Offered	Unique Callers	Total Calls Handled	Total Calls Abandon (Net)	Abandon Rate (Net)	Service Level Percent	Time in Queue (Avg)	Total Talk Time	Time with Agent (Avg)	Time Abandon (Avg)
⊞ (01)-January	21,166	250	10,038	52	10,822	10,440	10,737	46	0.43%	93.48%	00:08	542:15:30	03:02	02:40
⊞ (02)-February	18,507	364	7,943	41	10,151	9,750	10,073	46	0.45%	93.16%	00:08	504:57:02	03:00	01:39
⊞ (03)-March	20,750	0	9,080	71	11,585	11,174	11,476	76	0.66%	90.99%	00:11	600:34:17	03:08	02:04
⊞ (04)-April	20,643	3	8,357	65	12,211	11,834	12,105	82	0.67%	91.87%	00:10	650:30:43	03:13	02:31
⊞ (05)-May	24,294	22	10,221	67	13,978	13,582	13,755	156	1.12%	88.10%	00:17	719:44:47	03:08	02:48
⊞ (06)-June	33,650	0	9,262	193	24,175	23,492	19,457	2,778	11.49%	54.19%	04:50	1372:47:27	04:14	12:35
⊞ (07)-July	32,593	31	3,866	263	28,412	27,685	25,484	1,698	5.98%	50.65%	02:14	2180:43:45	05:08	06:06
⊞ (08)-August	31,134	0	4,118	175	26,828	26,128	24,961	1,104	4.12%	52.79%	01:33	2056:21:28	04:57	04:11
⊞ (09)-September	22,089	40	3,042	106	18,895	18,373	18,055	520	2.75%	72.94%	00:43	1386:29:36	04:36	03:14
⊞ (10)-October	20,035	630	2,667	96	16,631	16,114	16,137	290	1.74%	78.79%	00:30	1228:24:09	04:34	02:51
⊞ (11)-November	13,262	541	1,831	41	10,840	10,449	10,513	203	1.87%	78.71%	00:30	771:09:44	04:24	03:23
⊞ (12)-December	29,148	61	18,651	146	10,111	9,742	9,853	160	1.58%	83.15%	00:25	720:52:27	04:23	03:47
Grand Total:	287,271	1,942	89,076	1,316	194,639	188,763	182,606	7,159	3.68%	72.33%	01:16	12734:50:55	04:11	07:49

OhioDAS

Office of Procurement Services

General Services Division

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I³ Agent Scripts & Screens

- Customized for each project

- Collects data while serving the caller

I³ Agent Scripts & Screens

- Screens that enable the agent to serve the caller

I³ Agent Scripts & Screens

- Customized for each customer, workflow, or project

- Centralizes in-bound, out-bound, voicemail transcription, and e-mail interactions

- All dispositions collected and consolidated for reporting

Call Center Production - Agent Summary
09/01/2014 - 09/30/2014 (30 Days / 22 Weekdays)

Agent	⊞ Type	Overall				
		Interactions	Per Day	Avg Handle Time (m)	Total Handle Time (h)	Avg Wrap Time (m)
Alan Olesen		303	10	3.02	15.26	0.12
Allison Leahy		369	12	5.55	34.15	0.07
Chelsea Dye		942	31	1.54	24.14	0.00
Chuck Edward		572	19	2.33	22.20	0.07
Colleen Thompson		839	28	4.75	66.45	0.18
David McKee		193	6	6.13	19.71	0.22
Diane Sass		57	2	3.58	3.40	0.53
Erin Percynski		424	14	5.01	35.37	0.15
Jacqueline Kozdron		488	16	2.65	21.59	0.06
Jeanie Dennis		1,009	34	4.90	82.37	0.15
John Naples		761	25	4.94	62.61	0.21
Juan Gonzales		1,037	35	4.21	72.82	0.15
Keith Cramer		1,608	54	1.50	40.20	0.00
Manuel Moreno		1,009	34	6.32	106.32	0.63
Michael Cunningham		228	8	4.35	16.52	0.49
Michelle Dillon		2,459	82	1.88	77.07	0.02
Mike Tisch		1,097	37	2.42	44.29	0.16

Understanding Call Drivers

Caller's Issue	% of Total
Other	20%
Review Credentials	20%
Coursework Review	14%
Pending License	13%
Status Update	11%
BCI / Fingerprints	6%
Alternative Licensure Options	5%
SSN / Multiple Accounts	5%
Incorrect Info on License	2%
Refund	2%
Payment	2%
	100%

Caller's Role	% of Total
New Application	35%
Renewal	23%
Other	16%
Out of State	8%
Administrator	6%
Substitute	5%
Coach	5%
Principal or Superintendent	2%
	100%

3,400 calls

OhioDAS | Office of Procurement Services
General Services Division | Service · Support · Solutions

Contact Info

Jassen Tawil, Director of Call Center

Cleveland Sight Center

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216-280-6987 (cell)

jtawil@ohiocontactcenter.com

John Naples, Team Lead

Cleveland Sight Center

Visit us on-line at www.ohiocontactcenter.com

Procurement List

PRODUCTS

- ✓ Batteries
- ✓ Computer Paper
- ✓ Disposable Backboards
- ✓ Gloves (Exam, Various)
- ✓ Remanufactured Printer Cartridges
- ✓ Silk Screen Printing
- ✓ Tape (Various)
- ✓ Digging / Striking Tools
- ✓ Industrial Cleaning Supplies

SERVICES

- ✓ Call Center
- ✓ Data Entry
- ✓ Imaging/Scanning
- ✓ Janitorial
- ✓ Lawn Care & Landscaping
- ✓ Laundry / Linen Rental
- ✓ Mailing & Collating
- ✓ Security Services
- ✓ Secure Document Destruction

This list is an example of some of the current DAS Contracts

OhioDAS | Office of Procurement Services
General Services Division | Service · Support · Solutions

Website Locations

State Procurement

www.procure.ohio.gov

OPCRP

http://das.ohio.gov/CRP

Contact

Ron Rowland, Manager
614-728-0853

Kristen Johnson, Procurement Analyst
614-387-0065

Mark Hollingsworth, CRP Purchasing Specialist
614-752-9782

Community Rehabilitation Programs
4200 Surface Road
Columbus, OH 43228
Fax: 614-485-1056

Email: DASGSD.OPCRP@das.ohio.gov

Website: http://das.ohio.gov/CRP

OhioDAS | Office of Procurement Services
General Services Division | Service · Support · Solutions

A Few Reminders…

- Presentation materials will also be available on our Web site to download

- Please remember to complete your evaluation forms before you leave today. Please place them on the registration table.

Thanks for attending today!

This concludes today's meeting.

Have a great afternoon!