

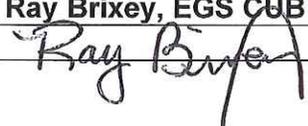
# **DAS Enterprise Goods and Services**

## **Procurement Services Program**

### **Service Level Agreement (SLA)**

# Approved by:

<i>DAS (Name &amp; Title)</i>	<i>Date</i>
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	10-6-14

<i>Customer Utility Board</i>	<i>Date</i>
Ray Brixey, EGS CUB Chair	
	10/08/14

# Changes:

<i>Date</i>	<i>Draft Version</i>	<i>DAS Staff Representatives</i>	<i>Customer Representatives</i>	<i>Description of changes</i>

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## **1. Introduction**

### **1.1. Background**

The Department of Administrative Services has four service enterprises, each governed by a Customer Utility Board (CUB). Each CUB acts as a governing board for the services provided by the associated service enterprise that have been designated as utility services.

The CUB's have four primary responsibilities:

- a) Approving general service level agreements.
- b) Approving rate-setting methodologies and resulting rates.
- c) Reviewing business plans and annual financial statements.
- d) Settling unresolved service complaints.

One of the key responsibilities assigned to CUB's is the approval of Service Level Agreement (SLA) documents. CUB's are responsible for reviewing and approving the content of these documents, ensuring the defined service levels are commensurate with the rates charged for each service.

CUB's are also responsible for approving the process to be followed for the development, approval and amendment of SLA documents. They assign members to specific workgroups created to conduct and oversee this work, and ensure participating representatives from customer agencies can clearly articulate the needs of the customers.

### **1.2. Objectives and purpose of SLA.**

The objective of this SLA document is to ensure both DAS Procurement Services (DS-PS) staff and customers understand and agree how the services will be performed and the responsibilities and expectations of each party.

The SLA will:

- a) Describe the services provided by DAS-PS.
- b) Identify service level objectives and performance targets for the services, agreed upon between DAS-PS and customers.
- c) Identify responsibilities of each party.
- d) Document the following service management processes agreed upon between DAS and customer representatives from all four CUB's:
  1. Performance tracking and reporting to customers.
  2. Review and amendment of the SLA document.
  3. Service-related dispute resolution.

This SLA document is not meant to be static, but a working document that will reflect the continuous change in services delivered by DAS, service delivery operating processes, and SLE agreed between DAS-PS and customers.

**1.3. Identification of DAS-PS Program.**

**1.3.1. Short description of DAS-PS program mission.**

Oregon Department of Administrative Services (DAS) works to effectively implement the policy and financial decisions made by the Governor and the Oregon Legislature.

DAS-PS is the enterprise-wide purchasing authority for the State of Oregon and fulfills a variety of roles within state government:

- Procurement of goods and services on behalf of state agencies, leveraging the purchasing power of local governments, state agencies and other states to ensure the cost-effective acquisition of goods and services.
- Providing training and consultation to employees of state and local governments, and suppliers on the application of purchasing laws, rules, procedures and policies and best practice as recognized by the Universal Public Purchasing Certification Council.
- Maintenance of an enterprise wide e-procurement system to support statewide procurement, purchasing and invoice settlement activities.

**1.3.2. Applicable statutes, rules and policies.**

Statute, Rule or Policy	Summary
<b>Oregon Public Contracting Code</b>	<a href="#">279A</a> Applies to all public contracting
	<a href="#">279B</a> Applies to supplies and services
	<a href="#">279C</a> Applies to architectural, engineering, land surveying services and related services; and public improvements
	<a href="#">279.835 - 855</a> Applying to Qualified Rehabilitation Facilities (QRF Statutes)
<b><u>OAR 125-055-0005 - 0130</u></b>	<a href="#">QRF- Rules Governing the QRF Program</a>
	<a href="#">HIPAA (Health Insurance Portability and Accountability Act) Privacy and Security Rule Implementation</a>
<b><u>OAR 125.046</u></b>	<a href="#">General Provisions for Public Contracting</a>
<b><u>OAR 125.047</u></b>	<a href="#">Public Procurement of Supplies and Services</a>
<b><u>OAR 125.048</u></b>	<a href="#">Consultant Selection: Architectural, Engineering and Land Surveying Services and Related Services Contracts</a>

<u><b>OAR 125.049</b></u>	<a href="#"><u>General Provisions Related to Public Contracts for Construction Services</u></a>
<u><b>OAR 137.045</b></u>	<a href="#"><u>Division 45 Review of Public Contracts</u></a>
<u><b>OAR 137.046</b></u>	<a href="#"><u>Division 46 Model Rules- General Provisions Related to Public Contracting</u></a>
<u><b>OAR137.047</b></u>	<a href="#"><u>Division 47 Model Rules – Public Procurements for Goods or Services</u></a>
<u><b>OAR 137.048</b></u>	<a href="#"><u>Division 48 Model Rules – Consultant Selection: Architectural, Engineering and Land Surveying Services and Related Services Contracts</u></a>

## 2. Service Catalog

The service catalog lists and describes the main services DAS-PS provides to its customers. The following criteria were considered in order to identify and describe the services included in the service catalog:

- The intent of the service catalog is to identify and describe services **from the customer’s point of view**. This helps to emphasize and explain the **benefits, outcomes and deliverables that the customers receive** when purchasing a service, as opposed to describing the whole set of internal support processes and activities executed by DAS-PS staff in order to deliver these services. As a result, business support processes and functions, such as database management, account management or help desk functions, are not captured or thoroughly explained in this catalog.
- The services included in this service catalog are those **available to DAS-PS customers today**. Service descriptions reflect the different features and options currently available to DAS-PS customers, enabling customers and PS staff to know what to expect and not expect from a service. Clearly defined services inform customers about service offerings, including what each service does and does not include, service boundaries, how to request services, and how to get help, as well as other factors influencing the extent to which they can be currently enjoyed by DAS-PS customers. Consequently, all narrative about future service features and offerings has been purposefully removed from the description of services included in this catalog.
- In order to identify and describe services with the right level of detail, consideration has been given to describing **services or offerings that can be purchased in stand-alone mode**. If a given service needs to be purchased as part of a packaged offering, the package will be described in its own service catalog sheet and the individual service will be described in the “what’s included” section of the packaged offering service catalog sheet.
- The purpose of the service catalog is to describe the **standard services and terms of service delivery**, not the exceptional services or service terms that can be offered to a given customer under special circumstances.

## 2.1. List of services provided by DAS PS program

A brief description of each service is included in the section below. For detailed descriptions about the services available to DAS-PS customers, consult the service catalog sheets in appendix 8.1 of this SLA document.

Service	Summary
<p><b>1. Agency specific procurements</b></p>	<p>PS partners with customer agencies to facilitate the procurement process by providing comprehensive agency specific procurement and contracting services to aid agencies in the development of agency specific solicitations and contracts. These services include, but are not limited to the following:</p> <ol style="list-style-type: none"> <li>1) Determining the most efficient and cost effective sourcing strategy - which may include utilization of an existing Statewide Price Agreement or the creation of an agency specific solution.</li> <li>2) Translating customer identified business outcomes into the language of procurement.</li> <li>3) Managing all phases of the procurement process, including: a) advertising the procurement opportunity, b) receiving responses to solicitations, c) leading agency subject matter experts in evaluating vendor responses, d) negotiating contract terms and conditions, e) executing contracts, and f) providing ongoing contract administration.</li> <li>4) Ensuring customer needs are met while at the same time providing solicitation documents that are legally sufficient and crafted to derive the best value for the state.</li> </ol>
<p><b>2. Statewide Price Agreements</b></p>	<p>PS maintains a portfolio of approximately 375 Statewide Price Agreements and multi-jurisdictional cooperative procurements. These agreements are readily available to authorized agencies via the ORPIN system and offer:</p> <ol style="list-style-type: none"> <li>1) Pricing that is based on volume discounts achieved from leveraging the state's buying power across the enterprise.</li> <li>2) Contracts that are continually managed to ensure the most strategic sourcing and efficient supply chain management possible.</li> <li>3) Ability to quickly procure needed goods and services without having to conduct lengthy procurement processes.</li> </ol>
<p><b>3. Procurement consultation and technical assistance</b></p>	<p>PS provides technical procurement assistance and consultation services to DAS divisions and customer agencies to facilitate the procurement process. Consultation can be part of a full procurement process managed by DAS-PS, or a stand-alone service provided to the customer. Technical assistance can include, but is not limited to, generation of reports, market analysis, process mentorship, or problem research and resolution.</p>
<p><b>4. Training &amp; certification services</b></p>	<p>DAS-PS provides Oregon specific public procurement related training and customized training services to state and local government personnel who have procurement, purchasing and contract administration responsibilities in their daily work. The program also maintains an Oregon credentialing program that has the goals of 1) improving the skills of public employees who spend public funds on goods and services, and 2) educating on procurement</p>

	practices that promote fair, transparent and responsible business practices consistent with Oregon Statutes and Administrative Rules.
<b>5. Access to ORPIN</b>	<p>The ORPIN system is Oregon's #1 resource for accessing public agency procurement opportunities. Most state agencies and many local governments use ORPIN to reach suppliers in order to procure goods and services. ORPIN is the means by which agencies advertise procurement opportunities, meeting the requirements of Oregon's public contracting code.</p> <p>Currently (as of April 10, 2014), registered ORPIN users include:</p> <ul style="list-style-type: none"> <li>• 63,818 registered vendors</li> <li>• 2519 state agency employees</li> <li>• 2444 ORCPP members</li> </ul>
<b>6. Embedded procurement staff</b>	<p>PS provides embedded into your team, working as the procurement expert with your permanent staff for the purpose of conducting complex project specific procurements on behalf of your agency, or for the purpose of developing and strengthening the procurement expertise of an agency's internal procurement staff.</p> <p>From a partial embed (project specific, less than full time) to a yearlong, full time engagement, PS can provide fully qualified and credentialed state procurement analysts and procurement and contract specialist 3's that enable you to meet your business needs.</p>

### 3. Service Level Expectations

#### 3.1. Performance metrics

This subsection identifies the metrics that will be used to track quality of service delivery along with timeliness and other service related attributes.

These metrics are agreed upon by DAS-PS and customer representatives and approved by the EGS CUB.

- 1) **Contract quality evaluation survey:** Percent of contract quality evaluation surveys stating the contract met original business needs.
- 2) **Contract delivery timeliness:** Percent of contracts completed within the timeframes agreed to with customers.
- 3) **Complaints on vendor performance:** Number of complaints on Statewide Price Agreement vendor performance.
- 4) **Availability of "how to buy guides":** Percent of Statewide Price Agreement contracts that include a "how to buy" guide accessible via ORPIN.
- 5) **Ease of use of Statewide Price Agreements:** Average rating of ease of use of Statewide Price Agreements as per customer survey.

- 6) **ORPIN help desk effectiveness:** Average rating of effectiveness of ORPIN help desk staff as per customer survey.
- 7) **ORPIN technical support resolution time:** Average number of hours from receipt of request for ORPIN technical support until customer issue is resolved / ticket is closed.
- 8) **Satisfaction with training:** Average overall satisfaction rating on evaluation surveys completed by state agency employees who have finished any procurement training course.

### 3.2. Service levels / performance targets

Metric Number	Metric Description	Key Quality Attribute	Service Performance Metric applies to	SLE- (Agreed upon performance target)
1	Percent of contract quality evaluation surveys stating the contract met original business needs	Quality of contract / contract meets business needs	<b>Agency Specific Procurement</b>	85%
2	Percent of contracts completed within the timeframes agreed to with customers	Timeliness / cycle times		85%
3	Number of complaints on vendor performance	Vendor performance	<b>Statewide Price Agreements</b>	TBD
4	Percent of price agreements that include 'how to buy' guides	Ease of use of Statewide Price Agreements		15% Year 1 25% Year 2 50% Year 3
5	Average rating of ease of use of Statewide Price Agreements as per customer survey.			7.5 (out of 10)
6	Average rating of ORPIN help desk staff effectiveness as per customer survey.	Effectiveness of ORPIN help desk	<b>Access to ORPIN</b>	9 (out of 10)
7	Average number of hours from receipt of request for ORPIN technical support until customer issue is resolved / ticket is closed.	Timeliness of ORPIN help desk		TBD

8	Average overall satisfaction rating on evaluation surveys completed by state agency employees who have finished any procurement training course.	Satisfaction with training	<b>Training and certification services</b>	8 (out of 10)
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#### 4. Financial Processes

##### 4.1. Billing

- **Assessment:** DAS-PS assesses customer agencies on an annual basis. The assessment is based on each agencies FTE.
- **Training:** DAS-PS training billing is done through the registration process. Customers register for classes using iLearn and can either pay with a credit card or be invoiced by SFS.
- **VCAF:** Fees are billed quarterly based on actual volume sales reports provided by the vendor. DAS-PS submits the invoice amount to DAS-SFS for invoicing and collection.

##### 4.2. Billing disputes

Billing disputes are handled by DAS-PS managers.

- Kelly Mix (503) 378-2998 [Kelly.Mix@oregon.gov](mailto:Kelly.Mix@oregon.gov)
- Ginny Beckwith (503) 378-4639 [Ginny.Beckwith@Oregon.gov](mailto:Ginny.Beckwith@Oregon.gov)
- Darwin Kumpula (503) 378-4642 [Darwin.Kumpula@Oregon.gov](mailto:Darwin.Kumpula@Oregon.gov)

Phone calls or emails describing the issue are quickly researched and addressed.

##### 4.3. Payment

DAS-PS follows the standard State of Oregon terms of net 30 days on all invoicing.

## 5. Service Management Processes

### 5.1. Performance measurement and reporting

DAS-PS will be responsible for measuring service performance, as well as reporting on compliance with the agreed SLEs or performance targets.

At a minimum, DAS-PS will develop and publish quarterly and annual performance reports as described below:

#### 5.1.1. Quarterly reports

Quarterly reports will track the performance target and the actual performance for each measure identified in the SLA document. They will be posted electronically on DAS-PS website for all customers to review.

At a minimum, these reports will include the following information:

**1. A comparison of actual performance results versus performance targets for the current period and at least the two previous periods.**

Quarterly reports can include other tables or graphs with additional views or analysis of performance along other dimensions relevant to DAS-PS. This may include a breakdown of performance results per geographic area, per customer group or per type or subtype of triggering event.

**2. A proposed action plan for each measure not in compliance with the agreed SLE or performance targets.**

An action plan will include:

- a. An analysis / statement of the **root causes / reasons** for not meeting the service level target(s).
- b. A description of **corrective actions identified and recommended** by the service provider in order to meet the agreed service level(s).
- c. A **timeframe** for the implementation of the corrective actions.

A measure will be considered not in compliance with the agreed performance target if either one of the following scenarios applies:

- a. If the SLE is measured monthly, when the performance is below target level for two consecutive months.
- b. If the SLE is measured quarterly, when the performance below target level in any given quarter.

**3. A report on customer-specific formal performance complaints received by DAS-PS over the previous quarter.** This report will:

- a. Identify number of complaints received by type.
- b. Describe each complaint / performance incident and the affected customer(s).

In addition to being posted on DAS-PS website, quarterly performance reports will be delivered to the members of the CUB governing the program. DAS-PS will be present at the CUB meeting

every quarter to present the report for CUB members to review the last quarter's performance report and to present and receive feedback on the corrective action plans for the measures where performance is not in compliance with the agreed targets.

### **5.1.2. Annual performance reports**

DAS-PS will develop and deliver a draft annual performance report, analyzing actual performance results achieved and corrective actions implemented during the previous year for each measure identified in the SLA document.

Based on the information shown on the draft annual performance report, members of the EGS CUB will have an option to review and provide feedback on any corrective actions recommended by DAS-PS to address non-compliance with performance targets. The CUB will also **monitor the implementation of the action plans agreed upon** with DAS-PS throughout the previous twelve months for the measures that did not show compliance with the established performance targets.

The annual performance report will include:

1. The same information as the quarterly performance reports for the performance of each measure identified in the SLA document over the last quarter of the year.
2. An additional section with follow up information about the corrective actions implemented and the results achieved for the measures where performance was not in compliance with the agreed SLE's in any given quarter within the year.

CUB members will use this annual report to conduct a yearly performance review, which will be deeper and broader than the regular performance reviews conducted every quarter between the CUB and DAS-PS. The recommendations and feedback provided by the CUB will be incorporated by DAS-PS into a final version of the annual performance report. The annual performance review process could lead to a review and / or amendment of the SLA document agreed between DAS-PS and its customers. The final report will be posted electronically on DAS-PS website.

## **5.2. SLA review and amendment**

This SLA is a living document, capable of being updated and amended over time with the agreement of both parties.

### **5.2.1. Ongoing SLA review.**

**SLA document reviews or amendments** will be considered as a result of any of the following:

1. A new service or a service enhancement is incorporated into DAS-PS catalog, allowing for new associated SLEs to be developed and added to the SLA document
2. Changes in DAS-PS ability to perform as a result of:
  - a. Significant and sustained change in workload demands.
  - b. A significant and sustained increase or reduction in DAS-PS resources.
  - c. A need to conform to other unforeseen organizational constraints within DAS or within state government.
3. When customer's expectations and / or performance service level needs have changed.
4. Evolution in DAS-PS tools and processes, which allow for better metrics and / or evolved performance level targets.

5. Missing performance targets by 15% (whether actual performance is over or under the target) in more than two consecutive quarters.
6. When DAS-PS corrective action recommends a reassessment in the performance targets agreed for a service.

The **SLA amendment process** will be as follows:

1. The request to review and modify the SLA document can be initiated by DAS-PS or any customer represented at the CUB.
2. Based on the nature or scope of the SLA modification request, the CUB and DAS-PS may undertake the modification and approval of the amended SLA document in the course of a regular CUB meeting or choose to create a SLA review team / workgroup for this purpose.
3. If an SLA review team is created, the workgroup will review and draft the recommended changes / updates to the content of the SLA document.
4. The draft amended SLA document will be submitted to the CUB for review and approval.

#### **5.2.2. Biennial SLA review.**

**The SLA will be reviewed at least once per biennium** to ensure service levels are adjusted and remain both appropriate for the services DAS-PS delivers and commensurate with the rates charged for each service.

The **biennial SLA review** will be as follows:

- The CUB and DAS-PS will designate a SLA review team consisting of customer and DAS-PS representatives. Customer representation will include at a minimum a member from the CUB.
- The SLA review team will conduct an analysis and evaluation of the SLA and identify any potential amendments to the SLA document. To do so, the SLA review team will:
  - a. Conduct an analysis of the SLEs against the actual performance results achieved in the last two years, identifying opportunities and / or needs to readjust service level expectations or performance targets.
  - b. Conduct a review of previous and potential performance issues that may affect services.
  - c. Conduct an evaluation of the success in the adoption, acceptance and commitment to the SLA by both parties:
    - i. How successful has the SLA been - has it made a difference?
    - ii. Has it been used by DAS-PS staff, and if not, why?
    - iii. Have customers used it or adhered to it, and if not, why?
    - iv. Has it helped manage customer expectations?
    - v. What barriers / problems have there been and what other feedback has the service provider received?
- The SLA team will review and make recommended changes / updates to the content of the SLA document
- The draft amended SLA document will be submitted to the CUB for review and approval.

#### **5.3. Incident management**

If services delivered by DAS-PS are below customer expectations, an informal approach often offers the quickest solution. If circumstances permit, DAS-PS customers should talk with the DAS-PS employee or unit involved in the situation to seek resolution to any performance dispute.

Service issues not resolved informally, should be reported to DAS-PS management as soon as an issue surfaces. DAS-PS managers are available via telephone or email and are committed to resolving issues in a timely manner.

Please contact the DAS-PS manager in charge of the sourcing or operational area related to your concern. Contact data for DAS-PS managers and staff can be found here:

- [http://www.oregon.gov/DAS/EGS/ps/Pages/contact\\_us.aspx](http://www.oregon.gov/DAS/EGS/ps/Pages/contact_us.aspx)

## 5.4. Complaint Resolution and Remediation

### 5.4.1. Principles

Performance complaints should be addressed and resolved at the lowest common level, collaboratively between the customer and representatives of DAS-PS.

If performance is below customer's expectations, an informal approach often offers the quickest solution. If circumstances permit, DAS-PS customers should talk with the DAS-PS employee or unit involved in the situation to seek resolution to any performance dispute, explain the problem and ask for assistance. If this informal approach does not resolve the issue, or if at any given time DAS-PS customers are not satisfied with the levels of utility services received, they may submit a formal performance complaint to DAS-PS via the formal complaint intake process described below.

Resolution of formal performance complaints raised by individual customers will be done in accordance with the following principles:

1. All complaints submitted using the process outlined below (section 5.4.2.) will be considered formal, and they will be logged, documented and published by the service provider.
2. Formal performance complaints shall only be considered resolved when:
  - a. DAS-PS and the affected customer(s) **have agreed on an action plan to solve / correct the problem;** and
  - b. **Applicable remedies** to compensate and / or exact reparation to the affected customer(s) **have been agreed** to the satisfaction of both parties.
3. In the event a customer is not satisfied with either the action plan or the remedies offered by DAS-PS, complaints can be escalated by the customer to the next level in the escalation path within DAS-PS for resolution.

### 5.4.2. Raising and recording formal complaints

Performance complaints will be submitted to the following email inbox established for this purpose: [EGSPSCustomerCare@oregon.gov](mailto:EGSPSCustomerCare@oregon.gov). All complaints submitted via this process will be considered formal complaints.

Formal complaints should include:

1. A summary description of the complaint. This description may include a customer's desired resolution of the matter.
2. Identification of affected customer(s).
3. If applicable, a description of aggravating circumstances (incident severity, repeated problems, estimated financial loss incurred or savings not materialized by the customer as a result of the performance incident, etc.)

All formal complaints received will be documented in a DAS-PS complaints log file, and responsibility will be assigned to staff within DAS-PS to follow up and seek resolution.

The information in the complaints log file will be used to develop the customer-specific formal performance complaints report that will be published as part of DAS-PS quarterly performance report.

#### **5.4.3. Complaint escalation process**

In the first instance complaints will be assigned to a supervisor of the functional unit affected by the complaint. After investigation and consultation with the staff involved, the supervisor will seek resolution by offering the complainant both:

1. **An action plan to solve / correct the problem**, which at a minimum will consist of:
  - a. A description of corrective actions identified and recommended by the service provider to solve / correct the problem.
  - b. A timeframe for the implementation of the corrective actions.
2. **Applicable remedies** to compensate and / or exact reparation to the affected customer.

A customer who has not obtained satisfactory resolution to their formal complaint can escalate the dispute to the next level in the escalation path within DAS-PS, until an action plan and appropriate remedial measures to solve the performance issue are agreed to the satisfaction of both customer and DAS-PS representatives. At each step in the escalation process, the customer needs to describe why the prior proposal by DAS-PS was not satisfactory. The steps in the escalation path after seeking resolution with the unit directly involved in the problem are the following:

- DAS-PS program management. If unresolved, escalate to
- Enterprise Good and Services administrator. If unresolved, escalate to
- Deputy Director of DAS. If unresolved, escalate to
- EGS CUB

At the end of the escalation process, the DAS EGS CUB will provide a last resort resolution forum to discuss and settle unresolved performance complaints.

#### **5.4.4. Remedies**

As part of resolving performance complaints, the following remedial actions can be offered to the complainant by DAS-PS.

1. A clear explanation for the performance incident will be offered in all instances to any customer raising a complaint.
2. A credit / discount on the service charges corresponding to the period when the performance incident occurred may be awarded in appropriate circumstances (based on

aggravating factors such as incident severity, financial losses incurred by the customer as a result of the performance issue, etc.).

3. A customer may be granted the ability to change providers for a specific service. This remedial measure will be reserved for exceptional circumstances in which resolution of a customer-specific performance issue has proved historically elusive, combining severe noncompliance with agreed SLEs or performance targets and repeated failure to implement corrective actions agreed between DAS-PS and customer to fix the underlying performance problem.

## 6. Glossary: Acronyms & Definitions

### 6.1. Acronyms

- **CSR:** Customer Service Request.
- **CUB:** Customer Utility Board.
- **DAS:** Department of Administrative Services.
- **DOJ:** Department of Justice.
- **DPO:** Designated Procurement Officer.
- **EAM:** Enterprise Asset Management.
- **EGS:** Enterprise Goods and Services.
- **EM:** Entrepreneurial Management.
- **EHRIS:** Enterprise Human Resource Services.
- **ETS:** Enterprise Technology Services.
- **FAQ:** Frequently Asked Questions.
- **FTE:** Full-Time Equivalent (see section 6.2 Definitions).
- **HIPAA:** Health Insurance Portability and Accountability Act.
- **IAA:** Interagency Agreement.
- **IRR:** Information Resource Request.
- **ITB:** Invitation to Bid.
- **MWESB:** Minority-owned, woman-owned and emerging small business.
- **ORPIN:** Oregon Procurement Information Network.
- **OAC:** ORPIN Agency Coordinator.
- **PO:** Purchase Order.
- **PS:** Procurement Services.
- **QRF:** Qualified Rehabilitation Facility (see section 6.2 Definitions).
- **RFI:** Request for Information (see section 6.2 Definitions).
- **RFP:** Request for Proposal (see section 6.2 Definitions).
- **SA:** Service Agreement.
- **SFMA:** Statewide Financial Management Application (see section 6.2 Definitions).
- **SLA:** Service Level Agreement.
- **SLE:** Service Level Expectation.
- **VCAF:** Vendor Collected Administrative Fee.

### 6.2. Definitions

- **Billing Dispute:** A customer billing dispute is any alleged inaccuracy, omission or error in relation to a service charge or reflected on a service bill.

- **Complaint (a.k.a. Performance or Service Complaint):** A formal expression of dissatisfaction with the quality of service received by a customer.

Formal complaints will be those raised by customers using a complaint intake email inbox or through other electronic means. Each service provider within DAS-PS will set up a dedicated email inbox or other electronic means (web forms, etc.) specifically established for this purpose.

A formal complaint can be motivated by one or many unresolved service incidents, an unresolved billing dispute or, generally speaking, by any perceived lack in the quality of operations or in the quality of services received by a customer.

- **Entrepreneurial Management:** Innovative public management model that uses customer choice, competition, and policy / service separation to increase service satisfaction.
- **Full-Time Equivalent (FTE):** This is the number of working hours that represents one full-time employee during a fixed time period, such as one month or one year.
- **Issue (a.k.a. Performance or Service issue):** Any event which is not part of the standard operation of a service which causes, or may cause, an interruption to, or a reduction in, the quality of that service. A service incident can be communicated by a customer or can be detected by the service provider.
- **Incident Management:** Process for dealing with service incidents and restoring normal service operation as quickly as possible, minimizing the adverse impact on business operations.
- **Qualified Rehabilitation Facility (QRF):** Non-profit Corporation operated in the interest of individuals with a disability, the net income of which does not inure in whole or in part to the benefit of any shareholder or other individual. QRF facilities employ Individuals with a disability for not less than 75 percent of the total work hours of direct labor required for the manufacture or provision of the products or services.
- **Rate (Service Rate):** A price that incorporates the costs of delivering the service at the service levels agreed to by both parties.
- **Remediation (a.k.a. Remedies or Remedial Actions / Measures):** In the event of a formal complaint raised by a customer, remediation refers to the list of actions / measures DAS-PS or any of its service delivery units can take or offer to compensate and / or exact reparation to the affected customer(s) above and beyond agreeing on an action plan to correct the underlying service problem.
- **Request for Information (RFI):** A process used to solicit information and aid in decision making. The RFI will not result in a contract, but is intended to gather information for future decision making.
- **Request for Proposal (RFP):** A written competitive solicitation process where price and specification are not the only consideration in determining award criteria. This solicitation process is intended to result in a contract.

- **Service:** A bundle of activities and resources (processes, people and IT resources) combined to provide a clear business outcome or output / deliverable received by the customer.
- **Service Agreement:** A document, signed by service provider and a single customer, reflecting customer-specific information such as choice of services from service catalog, specific operational procedures between the parties, or contact information for critical information systems or processes, etc.
- **Service Catalog:** A description of the services and service offerings provided by a service provider. This can be a multi-level set of information with linked and discrete hierarchies of services, child services and specific 'offerings' (specific tasks) available for these services, and will typically describe service terms, standards, packages (if available), exclusions (if applicable), etc.
- **Service Level Agreement (SLA):** A document, specific per service provider, which includes the following core elements: (1) A service catalog; (2) A set of agreed SLEs (performance targets); (3) A statement of responsibilities of service provider and customers; and (4) A description of key service management processes. All of these elements help improve service delivery, manage expectations, clarify responsibilities and facilitate communication between the service provider and its customer base.
- **Service Level Expectation (SLE):** Written, measureable target for a service or a process performance agreed between service provider and customers.
  - a. For any given service with an SLE, service performance targets will be common to all customers (concept of utility services).
  - b. If a service offering includes different packages / levels of service, different packages of the same service can have different performance targets but these will be common to all customers of the same package / level of service.
- **Statewide Financial Management Application (SFMA).** This is the accounting IT system in use by most state agencies of Oregon state government.
- **Statement of Work (SOW):** A written statement that specifically describes the phases of work or services, major tasks, or areas of responsibility the contractor is to perform. The SOW typically identifies specific objectives that the contractor is to attain or describes in detail the deliverables that the contractor is to provide and when they are to be provided.
- **Utility Service:** DAS utility services are those most efficiently provided through DAS-PS in order to maximize efficiency or capture economies of scale—where it makes economic sense to have a single supplier for all users for any of the following reasons: economies of scale; policy reasons; the need for one integrated system; or a strong need for uniformity.

Customers of utility services are local government entities, individual state agencies and other public entities that may choose how much to purchase, but for any of the reasons cited above the choice of supplier is limited to a single designated source.

## 7. Contact Data

- Procurement Services is located at:

General Services Building (2<sup>nd</sup> floor)  
1225 Ferry Street, Salem OR 97301  
503-378-4642  
<http://www.oregon.gov/DAS/EGS/PS/pages/index.aspx>

- Procurement Services Management Team:

**Debbie Dennis** (503) 378-2631 [Debbie.Dennis@oregon.gov](mailto:Debbie.Dennis@oregon.gov)  
*State Procurement Services Manager*

**Kelly Mix** (503) 378-2998 [Kelly.Mix@oregon.gov](mailto:Kelly.Mix@oregon.gov)  
*Procurement Manager for: Asset Management; Business Services; Research & Analysis; and Procurement Resources*

**Ginny Beckwith** (503) 378-4639 [Ginny.Beckwith@Oregon.gov](mailto:Ginny.Beckwith@Oregon.gov)  
*Procurement Manager for: I.T., Workplace Supplies, ORPIN System*

**Darwin Kumpula** (503) 378-4642 [Darwin.Kumpula@Oregon.gov](mailto:Darwin.Kumpula@Oregon.gov)  
*Procurement Manager for: Vehicles & Transportation; Construction & Facilities, Travel & Hospitality; Statewide Training Program*

## 8. Appendixes

### 8.1. Service Catalog sheets

1- Agency Specific Procurements	
1. What is the service?	Description
a. Service Summary	<p>PS partners with customer agencies to facilitate the procurement process by providing comprehensive agency specific procurement and contracting services to aid agencies in the development of agency specific solicitations and contracts. These services include, but are not limited to the following:</p> <ol style="list-style-type: none"> <li>1) Determining the most efficient and cost effective sourcing strategy - which may include utilization of an existing Statewide Price Agreement or the creation of an agency specific solution.</li> <li>2) Translating customer identified business outcomes into the language of procurement.</li> <li>3) Managing all phases of the procurement process, including: a) advertising the procurement opportunity, b) receiving responses to solicitations, c) leading agency subject matter experts in evaluating vendor responses, d) negotiating contract terms and conditions, e) executing contracts, and f) providing ongoing contract administration.</li> <li>4) Ensuring customer needs are met while at the same time providing solicitation documents that are legally sufficient and crafted to derive the best value for the state.</li> </ol>
b. What is included?	<ol style="list-style-type: none"> <li>1. Recommend, and apply the appropriate method of solicitation, evaluating the risk associated with the contract, advertising format, insurance requirements, and methods of compensation.</li> <li>2. Consultation with client state agencies to mutually develop procurement timeline.</li> <li>3. Review and provide feedback to agency representative on draft documents provided by the customer throughout the development of statement of work or specification documents.</li> <li>4. Conduct market research on specific commodities or services for market trends, as needed.</li> <li>5. In consultation with agency customer, prepare, issue, and monitor solicitations (i.e., RFPs, RFQs, invitations to bid, sole source, etc.), including addenda as required.</li> <li>6. Plan, coordinate and lead pre-bid and pre-proposal conferences; interpret procurement regulations and answer questions about solicitation process.</li> </ol>

	<ol style="list-style-type: none"> <li>7. Serve as chair of evaluation and negotiation committees, in compliance with state and federal rules and regulations.</li> <li>8. Assess, determine, and prepare recommendation on the validity of offers' protests.</li> <li>9. Examine and evaluate solicitation responses and ensure successful completion of the contractor selection process.</li> <li>10. Review and develop contractual provisions based upon program requirements to minimize risk to the State of Oregon and facilitate Attorney General's approval when required.</li> <li>11. Confer with client agencies, concerning contract terms and conditions.</li> <li>12. Devise negotiating strategies with goals and alternatives.</li> <li>13. Perform contract administration responsibilities, including: <ul style="list-style-type: none"> <li>• Renew contracts after review from agency and attains mutual agreement between client agency and supplier.</li> <li>• Evaluate contractor performance or quality of services.</li> <li>• Prepare contract amendments, extensions, or change orders ensuring compliance with original solicitation and contract requirements.</li> <li>• Manage contract terminations and contract breach actions.</li> </ul> </li> </ol>
<p>c. What is not included in the service?</p>	<p>PS does not provide the following to agencies:</p> <ol style="list-style-type: none"> <li>1) Technical specifications for products of services</li> <li>2) Legal advice</li> <li>3) Authority to conduct special procurements</li> <li>4) Designations of agency DPO's</li> <li>5) Budget / expenditure approval to conduct procurement</li> <li>6) Acceptance of deliverables, products, or services</li> <li>7) Management of invoicing and payment processes</li> <li>8) IRR and business case development for information technology procurements</li> </ol>
<p>d. Offerings and options</p>	<p>A variety of options exist for meeting agency procurement and contracting needs. These include:</p> <ol style="list-style-type: none"> <li>1) Agency specific solicitation services that are all encompassing and may include one of these specific solicitation methods: <ol style="list-style-type: none"> <li>a) Request for Proposal (RFP)</li> <li>b) Request for Quote (RFQ)</li> <li>c) Invitation to Bid (ITB)</li> <li>d) Special Procurement</li> <li>e) Sole Source</li> </ol> </li> </ol>

	<p>2) PS provides procurement services that do not require a new solicitation. These include:</p> <p>a) Contract administration activities for contracts not established by DAS-PS, including:</p> <ul style="list-style-type: none"> <li>• Amendments to existing contracts</li> <li>• Reinstatement of expired contracts</li> <li>• Retroactive approval of certain procurement actions</li> <li>• Review of contractual terms and conditions</li> </ul> <p>b) Interagency (IAA) and inter-governmental agreements</p> <p>c) Draft and execute QRF contracts</p> <p>d) Direct awards based on \$10k threshold</p> <p>e) Issuance of work orders or purchase orders against existing contracts</p>
<p>e. Service Prerequisites</p>	<p>Customers must be an agency of the State of Oregon who are subject to DAS procurement statues and administrative rules; or otherwise be able to delegate such authority to DAS-PS.</p>
<p>f. (Service-specific) Customer and provider responsibilities</p>	<p><b>DAS-PS responsibilities:</b></p> <ul style="list-style-type: none"> <li>• Procurement expertise that matches the correct skill level to the request</li> <li>• Timely response to customer request and timeline creation</li> <li>• Document management and version control during the procurement process</li> <li>• Post final contract and related documents in ORPIN</li> <li>• Provide master contract file maintenance and retention</li> <li>• Inclusion of Risk Management and DOJ when necessary</li> </ul> <p><b>Customer responsibilities:</b></p> <ul style="list-style-type: none"> <li>• Submit request for PS in the prescribed manner</li> <li>• Provide statement of work, technical specifications, and / or description of deliverables</li> <li>• Determine schedule of payments</li> <li>• Provide agency single point of contact to PS for the solicitation process</li> <li>• Provide primary agency contacts for contract administration issues post contract execution</li> <li>• Attend kick-off meeting, identify and invite agency resources such as agency procurement staff, subject matter experts and program managers</li> <li>• Respond timely to requests for information</li> <li>• Review and approve documents as requested</li> <li>• Participate in vendor conferences, proposal evaluations, and contact negotiations as requested / needed</li> <li>• Ensure budget authority to enter into resulting contracts and to pay for any reviews requested or required of DOJ / PS</li> </ul>

2. How is the service requested?	Description	
a. How is this service requested?	<p>Customers who are state agencies other than DAS, must request services through the submission of a PR through the ORPIN System.  <a href="http://orpin.oregon.gov">http://orpin.oregon.gov</a></p> <ul style="list-style-type: none"> <li>• If you need ORPIN assistance to submit a request contact your OAC: <a href="http://www.oregon.gov/DAS/EGS/PS/pages/oaclist.aspx">http://www.oregon.gov/DAS/EGS/PS/pages/oaclist.aspx</a></li> <li>• If your agency does not have an OAC, email the ORPIN help desk at <a href="mailto:info.orpin@oregon.gov">info.orpin@oregon.gov</a> for assistance.</li> <li>• Customers who are divisions of DAS must request service through the submission of a CSR. Please submit a request to: <a href="mailto:DAS.PS.ContractServices@Oregon.gov">DAS.PS.ContractServices@Oregon.gov</a></li> </ul>	
b. What forms are used/ needed to request this service?	<p>For DAS Divisions: Complete a CSR form at:  <a href="http://www.oregon.gov/DAS/EGS/ps/TemplatesForms/CSR-Form.pdf">http://www.oregon.gov/DAS/EGS/ps/TemplatesForms/CSR-Form.pdf</a></p>	
c. When can you expect to have your service request fulfilled?	Step	Service Expectation
	Acknowledge receipt of service request	1 to 2 business day from submission
	Assign PS staff resource	3 business days from submission
	Assigned PS staff Initial contact with requestor	5 business days from submission
	Mutually agreed project timeline Request fulfilled	10 business days from request Completion date will be based on approved project timeline as mutually agreed by PS and the requestor.
3. How do I get help? How does DAS-PS provide support to customers?	Description	
a. Self-service support	<p>DAS-PS Website:</p> <ul style="list-style-type: none"> <li>• General Information:  <a href="http://www.oregon.gov/DAS/EGS/ps/Pages/index.aspx">http://www.oregon.gov/DAS/EGS/ps/Pages/index.aspx</a></li> <li>• Public Contracting Code, Rules and Policies:  <a href="http://www.oregon.gov/DAS/EGS/ps/Pages/ors279-menu.aspx">http://www.oregon.gov/DAS/EGS/ps/Pages/ors279-menu.aspx</a></li> <li>• Forms and Links:  <a href="http://www.oregon.gov/DAS/EGS/ps/Pages/purchasing-links.aspx">http://www.oregon.gov/DAS/EGS/ps/Pages/purchasing-links.aspx</a></li> </ul>	

b. How to request support	<a href="mailto:EGSPSCustomerCare@oregon.gov">EGSPSCustomerCare@oregon.gov</a> 503-378-4642 Fax: 503-373-1626
c. When can you expect to get a response?	Within one business day.

## 2- Statewide Price Agreements

1. What is the service?	Description
a. Service Summary	<p>DAS-PS maintains a portfolio of approximately 375 Statewide Price Agreements and multi-jurisdictional cooperative procurements. These agreements are readily available to authorized agencies via the ORPIN system and offer:</p> <ol style="list-style-type: none"> <li>1) Pricing that is based on volume discounts achieved from leveraging the state's buying power across the enterprise.</li> <li>2) Contracts that are continually managed to ensure the most strategic sourcing and efficient supply chain management possible.</li> <li>3) Ability to quickly procure needed goods and services without having to conduct lengthy procurement processes.</li> </ol>
b. What is included?	<ol style="list-style-type: none"> <li>1. Access to a portfolio of established Statewide Price Agreements and multi-jurisdictional cooperative procurements that cover a broad spectrum of frequently used services and supplies in these general categories: <ol style="list-style-type: none"> <li>a) <b>Asset Management:</b> Financial Services, Accounts Receivable / Debt Collection, Asset Related Equipment, Inventory, Relocation, Disposal / Recycling, Business Continuity, Disaster Recovery, Real Estate and Leasing Services.</li> <li>b) <b>Business Services:</b> Auditing, Project Quality Assurance, Consultation, Contract Printing, Exam Certification, Facilitation, Interpretation / Translation; Transcription, Legal Services, Marketing, Staffing and Training.</li> <li>c) <b>Workplace Supplies &amp; Services:</b> Environment, Laboratory Services &amp; Equipment, Mailing Equipment, Medical &amp; Dental Services &amp; Supplies, Pharmaceuticals, Police Equipment, Supplies &amp; Services and Janitorial Supplies.</li> <li>d) <b>Information Technology:</b> Audio / Video, Copiers, Hardware, SaaS, Services, Software and Telecom.</li> <li>e) <b>Construction &amp; Facilities:</b> Building Maintenance, Building Repair, Construction, Electrical, Facilities, Fire / Security, HVAC, Janitorial Services, Landscaping, Plumbing and Signage.</li> <li>f) <b>Vehicles &amp; Transportation:</b> Auto Related Equipment, Fleet Rental / Lease, Fuel, Lubricants, etc., Restaurant Equipment, Paint and Vehicles.</li> </ol> </li> </ol>

	<p>g) <b>Travel &amp; Hospitality:</b> Food, Textiles, Travel Management, Vehicle Rentals, Airfare and Lodging.</p> <p>2. Procurements that are in compliance with state and federal rules and regulations and that have been approved for legal sufficiency by DOJ.</p> <p>3. Contract administration, supplier performance audits, and supplier price compliance reviews.</p>
c. What is not included in the service?	<p>DAS-PS Statewide Price Agreements do not provide the following to agencies:</p> <ol style="list-style-type: none"> <li>1. Ability to negotiate agency specific terms and conditions that materially differ from those in the price agreement.</li> <li>2. Procurement transactions (i.e. purchase order, work orders, etc.) If you desire these services, please see service sheet for agency specific procurements.</li> <li>3. Acceptance of deliverables, products, or services.</li> <li>4. Management of invoicing and payment processes.</li> </ol>
d. Offerings and options	<ul style="list-style-type: none"> <li>• Electronic access to a wide variety of established Statewide Price Agreements, including multi-state cooperative agreements.</li> <li>• Consultations with agencies on how to expand / modify established price agreements to better meet agency needs.</li> </ul>
e. Service prerequisites	<ul style="list-style-type: none"> <li>• Customers must be an agency of the State of Oregon whose procurement authority is under DAS rules or a member of the Oregon Cooperative Procurement Program (ORCPP).</li> <li>• Access to ORPIN system: <a href="http://orpin.oregon.gov">http://orpin.oregon.gov</a></li> </ul>
f. (Service-specific) Customer and provider responsibilities	<p><b>DAS-PS responsibilities:</b></p> <ul style="list-style-type: none"> <li>• Maintain availability of Statewide Price Agreements and cooperative procurement contracts for critical goods and services.</li> <li>• Maximize agencies involvement in evaluating Statewide Price Agreements.</li> <li>• Conduct thought determination processes to determine if Statewide Price Agreements are the best mechanism for specific needs.</li> <li>• Inclusion of Risk Management and DOJ when necessary.</li> <li>• Ongoing contract administration and vendor relationship management.</li> </ul> <p><b>Customer responsibilities:</b></p> <ul style="list-style-type: none"> <li>• Follow prescribed processes in each Statewide Price Agreement for ordering supplies / services under a specific agreement.</li> <li>• Do not exceed your procurement authority in accessing services supplies under Statewide Price Agreements.</li> </ul>

	<ul style="list-style-type: none"> <li>• If needed, submit request for procurement services in the prescribed manner.</li> <li>• Respond timely to requests for information.</li> <li>• Provide feedback on vendor performance to PS.</li> <li>• Participate in resolving disputes between vendors and agency.</li> <li>• Customers must have budget authority to enter into resulting contracts.</li> </ul>	
<b>2. How is the service requested?</b>		
a. How is this service requested?	<p>Statewide Price Agreements are accessed through the ORPIN system: <a href="http://orpin.oregon.gov">http://orpin.oregon.gov</a></p> <p>For assistance: Contact PS ORPIN help desk:</p> <ul style="list-style-type: none"> <li>• <b>By email:</b> Send an email to the ORPIN help desk at <a href="mailto:info.orpin@oregon.gov">info.orpin@oregon.gov</a> for assistance. Please be sure to include your company / organization name in your message so that we can easily find your account in ORPIN.</li> <li>• <b>By phone:</b> (503) 378-4642, option 1. This will take you to the ORPIN <b>Automated help desk phone tree</b>. It provides answers to some of the most commonly asked questions. You can also hit the star key * at any time <b>to leave a message for a return call</b>.</li> </ul> <p>Response to email and voice mail will occur M–F, 7:30am -4:30pm</p>	
b. What forms are used/ needed to request this service?	Not applicable	
c. When can you expect to have your service request fulfilled?	Step	Service Expectation
	Ongoing	Ongoing availability with no gap in services for existing Statewide Price Agreements
<b>3. How do I get help? How does DAS-PS provide support to customers?</b>		
a. Self-service support	<p>General Information: DAS-PS Website: <a href="http://www.oregon.gov/DAS/EGS/ps/pages/index.aspx">http://www.oregon.gov/DAS/EGS/ps/pages/index.aspx</a></p> <p>Price agreements access: <a href="http://orpin.oregon.gov">http://orpin.oregon.gov</a></p>	
b. How to request support	<p><a href="mailto:EGSPSCustomerCare@oregon.gov">EGSPSCustomerCare@oregon.gov</a>  503-378-4642  Fax: 503-373-1626</p>	

c. When can you expect to get a response?	Within one business day.
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3- Procurement Consultation & Technical Assistance	
1. What is the service?	Description
a. Service Summary	DAS-PS provides technical procurement assistance and consultation services to DAS divisions and customer agencies to facilitate the procurement process. Consultation can be part of a full procurement process managed by DAS-PS, or a stand-alone service provided to the customer. Technical assistance can include, but is not limited to, generation of reports, market analysis, process mentorship, or problem research and resolution.
b. What is included?	<p><b>Consultation Services:</b></p> <ol style="list-style-type: none"> <li>1) Assisting in the design, development and implementation of procurement strategies</li> <li>2) Strategic sourcing – helping customers identify available sources for their procurement needs (i.e. Statewide Price Agreements, cooperative procurements, etc.)</li> <li>3) Contract terms / conditions review</li> <li>4) Contract administration assistance / supplier relationship management – strategies to identify relationship needs &amp; conflict resolution management</li> <li>5) Market research</li> </ol> <p><b>Technical Assistance:</b></p> <ol style="list-style-type: none"> <li>1) Spend analysis and reporting</li> <li>2) Potential savings identification (opportunity analysis)</li> <li>3) Supply chain risk identification, mitigation and management</li> <li>4) Supplier price and performance audits</li> <li>5) Mentoring on procurement processes</li> </ol>
c. What is not included in the service?	<p>Consultation &amp; technical assistance services do not include:</p> <ol style="list-style-type: none"> <li>1) Conducting solicitation processes (RFP, ITB, etc.)</li> <li>2) Providing legal advice</li> <li>3) Delegating procurement authority</li> <li>4) Designations of agency DPO's</li> <li>5) Budget / expenditure approval to conduct procurement</li> <li>6) Acceptance of deliverables, products, or services</li> <li>7) Management of invoicing and payment processes</li> <li>8) Active contract administration</li> <li>9) Development or approval of agency internal procurement policies</li> </ol>

<p>d. Offerings and options</p>	<p>Consultation &amp; technical assistance can be requested in three general ways.</p> <ol style="list-style-type: none"> <li>1) Informal requests for information / clarification sent via e-mail or via phone to DAS-PS staff.</li> <li>2) Formal requests for documents review, strategy sessions, on-site consultations, etc.</li> <li>3) As part of an agency specific procurement process in which DAS-PS is conducting the procurement. <ul style="list-style-type: none"> <li>• <b>Additional Service:</b> DAS-PS can issue a RFI to the vendor community to assist agencies in gathering information and determining potential opportunities and costs for specific needs.</li> </ul> </li> </ol>
<p>e. Service prerequisites</p>	<p>Requestor needs to be an agency of the State of Oregon or of one of its political sub-divisions.</p>
<p>f. (Service-specific) Customer and provider responsibilities</p>	<p><b>DAS-PS Responsibilities:</b></p> <p><u>Informal Request:</u></p> <ul style="list-style-type: none"> <li>• Respond to informal customer inquiries within 24 hours.</li> <li>• Take responsibility for information we provide.</li> </ul> <p><u>Formal Request:</u></p> <ul style="list-style-type: none"> <li>• Acknowledge request within 24 hours.</li> <li>• Review and approve documents as requested within timeframes mutually agreed upon with customer.</li> <li>• Take responsibility for information we provide.</li> <li>• Refer customers to other resources if need is outside of our service line (DAS-PS Policy office, DOJ, etc.).</li> </ul> <p><b>Customer Responsibilities:</b></p> <p><u>Informal Request:</u></p> <ul style="list-style-type: none"> <li>• Provide as much detail as possible related to the issue you are requesting consultation about in order to expedite response.</li> <li>• Initiate request for consultative services.</li> </ul> <p><u>Formal Request:</u></p> <ul style="list-style-type: none"> <li>• Submit formal request for consultative services. Request should be submitted as outlined in section 2(c).</li> <li>• Attend meetings.</li> <li>• Identify agency resources such as agency procurement staff, subject matter experts and program managers.</li> <li>• Respond timely to requests for information.</li> <li>• Review and approve documents as requested.</li> </ul>

2. How is the service requested?	Description																		
a. How is this service requested?	<p>For <i>informal consultations</i>, customers may contact a DAS-PS via e-mail at <a href="mailto:EGSPSCustomerCare@oregon.gov">EGSPSCustomerCare@oregon.gov</a></p> <p>We may also be contacted via phone at (503) 378-3529.</p> <p>For <i>formal consultation</i> requests:</p> <ol style="list-style-type: none"> <li>1) Customers who are state agencies other than DAS, must request services through the submission of a PR through the ORPIN system. <a href="http://orpin.oregon.gov">http://orpin.oregon.gov</a></li> <li>• If you need ORPIN assistance to submit a request contact your OAC at: <a href="http://www.oregon.gov/DAS/EGS/PS/pages/oacolist.aspx">http://www.oregon.gov/DAS/EGS/PS/pages/oacolist.aspx</a></li> <li>• If your agency does not have an OAC, email the ORPIN help desk at <a href="mailto:info.orpin@oregon.gov">info.orpin@oregon.gov</a> for assistance.</li> <li>2) Divisions of DAS must request service through the submission of a CSR at: <a href="mailto:DAS.PS.ContractServices@oregon.gov">DAS.PS.ContractServices@oregon.gov</a></li> </ol>																		
b. What forms are used / needed to request this service?	<p><b>Formal Consultation Request, including requests for RFIs:</b></p> <p>For DAS divisions: Complete a CSR form at: <a href="http://www.oregon.gov/DAS/EGS/ps/docs/CSR-Form.pdf">http://www.oregon.gov/DAS/EGS/ps/docs/CSR-Form.pdf</a></p> <p>For state agencies: Submit a PR through the ORPIN system. If you need ORPIN assistance to submit a request contact your OAC.</p> <ul style="list-style-type: none"> <li>• If your agency does not have an OAC, email the ORPIN help desk at <a href="mailto:info.orpin@oregon.gov">info.orpin@oregon.gov</a> for assistance.</li> </ul>																		
c. When can you expect to have your service request fulfilled?	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="2" style="text-align: center;"><b>Informal Consultation Requests</b></th> </tr> <tr> <th style="width: 60%;">Step</th> <th>Service Expectation</th> </tr> </thead> <tbody> <tr> <td>Acknowledge receipt of service request</td> <td>1 to 2 business days from submission</td> </tr> <tr> <th colspan="2" style="text-align: center;"><b>Formal Consultation Requests</b></th> </tr> <tr> <td>Assign PS staff resource</td> <td>3 business days from submission</td> </tr> <tr> <td>Assigned PS staff initial contact with requestor</td> <td>5 business days from submission</td> </tr> <tr> <td>Mutually agreed project timeline</td> <td>10 business days from request</td> </tr> <tr> <td>Request fulfilled</td> <td>Completion date will be based on approved project timeline as mutually agreed by PS and the requestor.</td> </tr> <tr> <th colspan="2" style="text-align: center;"><b>Technical Assistance</b></th> </tr> </tbody> </table>	<b>Informal Consultation Requests</b>		Step	Service Expectation	Acknowledge receipt of service request	1 to 2 business days from submission	<b>Formal Consultation Requests</b>		Assign PS staff resource	3 business days from submission	Assigned PS staff initial contact with requestor	5 business days from submission	Mutually agreed project timeline	10 business days from request	Request fulfilled	Completion date will be based on approved project timeline as mutually agreed by PS and the requestor.	<b>Technical Assistance</b>	
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<b>Technical Assistance</b>																			

	Step	Service expectation
	Assign PS staff resource	3 business days from submission
	Request fulfilled	Within 2 weeks of staff assignment.
<b>3. How do I get help? How does DAS-PS provide support to customers?</b>	<b>Description</b>	
a. Self-service support	DAS-PS website: <ul style="list-style-type: none"> <li>• General Information: <a href="http://www.oregon.gov/DAS/EGS/ps/Pages/index.aspx">http://www.oregon.gov/DAS/EGS/ps/Pages/index.aspx</a></li> <li>• Public Contracting Code, Rules and Policies: <a href="http://www.oregon.gov/DAS/EGS/ps/Pages/ors279-menu.aspx">http://www.oregon.gov/DAS/EGS/ps/Pages/ors279-menu.aspx</a></li> <li>• Forms and Links: <a href="http://www.oregon.gov/DAS/EGS/ps/Pages/purchasing-links.aspx">http://www.oregon.gov/DAS/EGS/ps/Pages/purchasing-links.aspx</a></li> </ul>	
b. How to request support	E-mail: <a href="mailto:EGSPSCustomerCare@oregon.gov">EGSPSCustomerCare@oregon.gov</a> Phone: 503-378-4642 Fax: 503-373-1626  For formal consultation requests already assigned to a PS staff resource, please contact that person directly. Updated phone list is available at: <a href="http://www.oregon.gov/DAS/EGS/ps/Pages/contact_us.aspx">http://www.oregon.gov/DAS/EGS/ps/Pages/contact_us.aspx</a>	
c. When can you expect to get a response?	Responses to initial inquiries can be expected within one business day.	

#### 4- Training & certification services

1. What is the service?	Description
a. Service Summary	DAS-PS provides Oregon specific public procurement related training and customized training services to state and local government personnel who have procurement, purchasing and contract administration responsibilities in their daily work. The program also maintains an Oregon credentialing program that has the goals of 1) improving the skills of public employees who spend public funds on goods and services, and 2) educating on procurement practices that promote fair, transparent and responsible business practices consistent with Oregon Statutes and Administrative Rules.
b. What is included?	1) Delivery of procurement training to a multitude of audiences using a variety of mechanisms:

	<ul style="list-style-type: none"> <li>○ Approximately 20 different individual classes on specific aspects of Oregon public procurement which are part of certification and recertification education tracks</li> <li>○ The foundational 40-hour course for the OPBC</li> <li>○ Online tutorials offered through the state's learning management system, iLearn</li> </ul> <ol style="list-style-type: none"> <li>2) Books and materials required for the instruction</li> <li>3) Audiences could include procurement staff, administrative staff, and program and project managers</li> <li>4) Testing and certification programs that offer three certificates of completion and two competency-based certifications related to Oregon public procurement: <ul style="list-style-type: none"> <li>○ Certificates of completion <ul style="list-style-type: none"> <li>▪ Oregon Small Procurement Certificate (OSPC)</li> <li>▪ Oregon Contract Administration Certificate (OCAC)</li> <li>▪ Administrative Certificate for Oregon Procurement (ACOP)</li> </ul> </li> <li>○ Competency-based certifications: <ul style="list-style-type: none"> <li>▪ Oregon Procurement Basic Certification (OPBC)</li> <li>▪ Oregon Procurement Advanced Certification (OPAC)</li> </ul> </li> </ul> </li> <li>5) Specialized workshops flexibly adapted to specific needs</li> <li>6) Consultation services regarding procurement training: <ul style="list-style-type: none"> <li>○ Individual development plans</li> <li>○ Credentialing strategies</li> <li>○ Advanced certification coaching</li> </ul> </li> </ol> <p>Procurement Certification Program Details:  <a href="http://www.oregon.gov/DAS/EGS/ps/Pages/types-certificate.aspx">http://www.oregon.gov/DAS/EGS/ps/Pages/types-certificate.aspx</a></p>
c. What is not included in the service?	<ol style="list-style-type: none"> <li>1. Core classes for other credentialing organizations</li> <li>2. Development and delivery of customer specific course content not related to Oregon public procurement</li> <li>3. Procurement policy determinations</li> <li>4. Legal advice</li> </ol>
d. Offerings and options	<p><b>Current Training Calendar:</b>  <a href="http://www.oregon.gov/DAS/EGS/ps/Pages/training-menu.aspx">http://www.oregon.gov/DAS/EGS/ps/Pages/training-menu.aspx</a></p> <p><b>Oregon Procurement Certification program:</b>  Available certificates of completion and certifications:</p> <ul style="list-style-type: none"> <li>• <a href="#">Oregon Small Procurement Certificate (OSPC)</a></li> <li>• <a href="#">Oregon Contract Administration Certificate (OCAC)</a></li> <li>• <a href="#">Administrative Certificate for Oregon Procurement (ACOP)</a></li> <li>• <a href="#">Oregon Procurement Basic Certification (OPBC)</a></li> <li>• <a href="#">Oregon Procurement Advanced Certification (OPAC)</a></li> <li>• <a href="#">Other Training that will qualify for Oregon Certification</a></li> </ul>
e. Service prerequisites	Requestor needs to be an employee of the State of Oregon or of one of its political sub-divisions.

<p>f. (Service-specific) Customer and provider responsibilities</p>	<p><b>DAS-PS training program responsibilities:</b></p> <ul style="list-style-type: none"> <li>• Create quality curriculum on procurement statutes, rules and best practices governing public procurement in Oregon</li> <li>• Provide quality instruction related to public contracting laws and procurement policies that apply to all public entities subject to the Oregon procurement code</li> <li>• Maintain up to date course descriptions and class schedules on the state's iLearn system</li> <li>• Provide class materials</li> <li>• Provide classroom space</li> <li>• Hold courses as scheduled, or timely notice of any logistic changes or class cancellations</li> <li>• Administer certification and credentials program and grant Oregon procurement credentials to individuals meeting program requirements</li> </ul> <p><b>Customer responsibilities:</b></p> <ul style="list-style-type: none"> <li>• Manager approval for enrollment / cancellation in classes through iLearn (includes payment)</li> <li>• Reporting self-reported learning events and tracking / monitoring credentials in iLearn</li> <li>• Access to browsers or other technical requirements needed to complete class e-assignments, tests, or to access online resources per instructions.</li> </ul>
<p><b>2. How is the service requested?</b></p>	<p style="text-align: center;"><b>Description</b></p>
<p>a. How is this service requested?</p>	<ul style="list-style-type: none"> <li>• Registering for training courses and managing enrollment is through the iLearn enrollment process.</li> <li>• Request for consultation services is accomplished by contacting PS training staff directly (see 3b).</li> </ul>
<p>b. What forms are used/ needed to request this service?</p>	<ul style="list-style-type: none"> <li>• iLearn is available to state and local agency staff through logon accounts. The iLearn system is accessed at: <a href="https://ilearn.oregon.gov">https://ilearn.oregon.gov</a></li> <li>• Requests for consultative services can be made in person, or via phone / e-mail.</li> </ul>
<p>c. When can you expect to have your service request fulfilled?</p>	<ul style="list-style-type: none"> <li>• iLearn sends automated e-mail notices once course registration or cancellation is requested.</li> <li>• Initial requests for consultative services will be responded to within one business day.</li> </ul>
<p><b>3. How do I get help? How does DAS-PS provide</b></p>	<p style="text-align: center;"><b>Description</b></p>

support to customers?	
a. Self-service support	<ul style="list-style-type: none"> <li>• Course registration and enrollment management are self-support activities through iLearn: <a href="https://ilearn.oregon.gov">https://ilearn.oregon.gov</a></li> <li>• For assistance in navigating iLearn, see the user resources page &amp; FAQ section at: <a href="http://www.oregon.gov/DAS/EHRS/pages/ilearn.aspx">http://www.oregon.gov/DAS/EHRS/pages/ilearn.aspx</a></li> <li>• Requests for consultative services can be made by contacting any of the DAS-PS training staff directly. See current DAS-PS staff roster linked in 3b below</li> </ul>
b. How to request support	<ul style="list-style-type: none"> <li>• iLearn: For assistance with your login ID or password, you can contact your agency <a href="#">iLearn Oregon Administrator</a></li> <li>• To request consultative services or to share concerns about the DAS-PS training program, contact program staff directly. The current DAS-PS staff roster is located at: <a href="http://www.oregon.gov/DAS/EGS/ps/Pages/contact_us.aspx">http://www.oregon.gov/DAS/EGS/ps/Pages/contact_us.aspx</a></li> </ul>
c. When can you expect to get a response?	<ul style="list-style-type: none"> <li>• Response times for iLearn requests for assistance are not managed by DAS-PS</li> <li>• Responses to inquiries made to DAS-PS training staff will be made within one business day</li> </ul>

## 5- Access to Oregon Procurement Information Network (ORPIN)

1. What is the service?	Description
a. Service Summary	<p>The ORPIN system is Oregon's #1 resource for accessing public agency procurement opportunities. Most state agencies and many local governments use ORPIN to reach suppliers in order to procure goods and services. ORPIN is the means by which agencies advertise procurement opportunities, meeting the requirements of Oregon's public contracting code.</p> <p>As of April 10, 2014, registered ORPIN users include:</p> <ul style="list-style-type: none"> <li>• 63,818 registered vendors</li> <li>• 2519 state agency employees</li> <li>• 2444 ORCPP members</li> </ul>
b. What is included?	<ul style="list-style-type: none"> <li>• A web based tool with access to Statewide Price Agreements and agency specific offerings</li> <li>• A means to advertise procurement opportunities to the public that meets the requirements of Oregon's public contracting code reporting for Green, MWESB and other initiative participation</li> <li>• E-mail notifications of solicitation opportunities. Electronic bid submission for certain opportunity types</li> </ul>

	<ul style="list-style-type: none"> <li>• Tutorials for new users</li> <li>• OAC Roundtables</li> <li>• Quarterly all day ORPIN training for new users</li> <li>• Online training manual</li> <li>• Visibility to registered, certified MWESB suppliers</li> <li>• Vendor ORPIN training which assists agencies in expanding their vendor pool</li> <li>• Agency based activity reporting</li> <li>• Help desk support via email, M-F, 7:30am-4:30pm</li> </ul>
c. What is not included in the service?	<ul style="list-style-type: none"> <li>• A live help desk</li> <li>• System customization</li> </ul>
d. Offerings and options	<ul style="list-style-type: none"> <li>• Permissions based on the role and authority of individual users</li> <li>• Development of tailored reports</li> </ul>
e. Service prerequisites	Full access to ORPIN requires establishing a user account
f. (Service-specific) Customer and provider responsibilities	<p><b>PS ORPIN program responsibilities:</b></p> <ul style="list-style-type: none"> <li>• Provide access to procurement and contracting information issued by the state of Oregon, local governments, and political subdivisions</li> <li>• Support and maintain system</li> <li>• Provide online resources, including tutorials and other self-help tools</li> <li>• Provide a high level of support / training to OAC so that they are able to manage their agency users</li> <li>• Submit annual reports for posting on the Oregon transparency website</li> <li>• Support end users without an OAC through the help desk</li> <li>• Monitor and maintain MWESB and SFMS data import</li> </ul> <p><b>Customer responsibilities:</b></p> <ul style="list-style-type: none"> <li>• OAC are expected to attend monthly OAC council meetings and new ORPIN trainings in order to remain up to date on system changes and procedures</li> <li>• Provide at least one DPO to process approval step for the agency</li> <li>• Follow all systems guidelines</li> </ul>
<b>2. How is the service requested?</b>	<b>Description</b>
a. How is this service requested?	<ul style="list-style-type: none"> <li>• Access for agency users of ORPIN requires establishing a user account. To request a user account, contact your OAC at: <a href="http://www.Oregon.gov/DAS/EGS/PS/pages/oaclist.aspx">http://www.Oregon.gov/DAS/EGS/PS/pages/oaclist.aspx</a></li> <li>• If your agency does not have an OAC, email the ORPIN help desk at <a href="mailto:info.orpin@oregon.gov">info.orpin@oregon.gov</a> for assistance</li> </ul>

b. What forms are used/ needed to request this service?	<ul style="list-style-type: none"> <li>Contact your OAC at: <a href="http://www.Oregon.gov/DAS/EGS/PS/pages/oaclist.aspx">http://www.Oregon.gov/DAS/EGS/PS/pages/oaclist.aspx</a></li> <li>If your agency does not have an OAC, email the ORPIN help desk at <a href="mailto:info.orpin@oregon.gov">info.orpin@oregon.gov</a> for assistance</li> </ul>
c. When can you expect to have your service request fulfilled?	<ul style="list-style-type: none"> <li>Requests for ORPIN help desk services made during help desk business hours will be responded to within two business days</li> <li>Requests to OAC's responses will be based on individual agency procedure</li> </ul>
<b>3. How do I get help? How does DAS-PS provide support to customers?</b>	<b>Description</b>
a. Self-service support	<p>See DAS-PS ORPIN webpage at: <a href="http://orpin.oregon.gov">http://orpin.oregon.gov</a></p> <p>Register for ORPIN training via iLearn. For more information or iLearn visit their website at: <a href="https://ilearn.oregon.gov">https://ilearn.oregon.gov</a></p> <ul style="list-style-type: none"> <li>Visit the ORPIN desk reference guide available in iLearn</li> <li>See tutorials embedded in specific sections of ORPIN</li> </ul>
b. How to request support	<ul style="list-style-type: none"> <li>Contact your agency ORPIN Coordinator: <a href="http://www.oregon.gov/DAS/EGS/PS/pages/oaclist.aspx">http://www.oregon.gov/DAS/EGS/PS/pages/oaclist.aspx</a></li> <li>Contact PS ORPIN help desk: <ul style="list-style-type: none"> <li><b>By email:</b> Send an email to the ORPIN help desk at: <a href="mailto:info.orpin@oregon.gov">info.orpin@oregon.gov</a> for assistance. Please be sure to include your company / organization name in your message so that we can easily find your account in ORPIN.</li> <li><b>By phone:</b> (503) 378-4642, option 1. This will take you to the ORPIN <b>help desk phone tree</b>. It provides answers to some of the most commonly asked questions. You can also hit the star key * at any time <b>to leave a message for a return call</b>.</li> </ul> </li> <li>Response to email and voice mail will occur M–F, 7:30am -4:30pm</li> </ul>
c. When can you expect to get a response?	<ul style="list-style-type: none"> <li>Agency ORPIN AOC response time is based on the individual agency</li> <li>PS ORPIN help desk response time is within two business days</li> </ul>

6- Embedded procurement staff	
<b>1. What is the service?</b>	<b>Description</b>

<p>a. Service Summary</p>	<p>DAS-PS can provide staff to embed into your team, working as the procurement expert with your permanent staff for the purpose of conducting complex project specific procurements on behalf of your agency, or for the purpose of developing and strengthening the procurement expertise of an agency's internal procurement staff.</p> <p>From a partial embed (project specific, less than full time) to a yearlong, full time engagement, DAS-PS can provide fully qualified and credentialed state procurement analysts and procurement and contract specialist that enable you to meet your business needs.</p>
<p>b. What is included?</p>	<p>Different from a job rotation, an embedded DAS-PS employee would conduct their work under their DAS procurement authority, continue to report to DAS-PS and remain an integral part of the DAS-PS team. Embedding offers a physical presence of a DAS-PS expert within your agency to provide services and expertise that may include, but are not limited to, the following:</p> <ul style="list-style-type: none"> <li>• Lead a cross-functional procurement team to plan and develop procurement strategies that meet agency business needs and result in procurement processes and contracts that are compliant with all public contracting statutes and administrative rules.</li> <li>• Devise negotiation strategies and serve as chair of evaluation and negotiation committees to obtain consensus on selection of contractors.</li> <li>• Advice and mentor agency management and procurement staff in best practice methods of conducting procurement.</li> </ul>
<p>c. What is not included in the service?</p>	<p><b>Factors Affecting Availability</b></p> <p>Due to the limited availability of this service, DAS-PS managers will evaluate our ability to fulfill each request for the assignment of embedded staff based on the following factors:</p> <ol style="list-style-type: none"> <li>1) The number of DAS-PS employees currently on embed assignments</li> <li>2) The specific customer needs, including: <ul style="list-style-type: none"> <li>• Duration of the requested assignment</li> <li>• Specific skill sets required for the assignment</li> <li>• % FTE needed (full time, half-time, etc).</li> </ul> </li> <li>3) Take into account different DAS-PS employees strengths and in-depth knowledge of specific sourcing areas (i.e. I.T., Transportation, etc.)</li> <li>4) Potential impact to DAS-PS operations and enterprise wide service delivery should the request be fulfilled</li> </ol> <p><b>Tasks / Services out-of-scope</b></p> <ol style="list-style-type: none"> <li>1) Developing business case for the procurement project</li> </ol>

	<ul style="list-style-type: none"> <li>2) Procurement project staff augmentation unrelated to a specific project or unrelated to development of the agency's procurement expertise</li> <li>3) Providing legal advice</li> <li>4) Delegating procurement authority</li> <li>5) Designating an agency DPO</li> <li>6) Budget / expenditure approval to conduct procurement</li> <li>7) Accepting deliverables, products, or services</li> <li>8) Managing invoice and payment processes</li> </ul>
d. Offerings and options	Each request to embed DAS-PS staff into other agencies requires unique negotiation and customization of the services to be provided, time commitments, level of expertise needed, etc. The service plan will reflect the specificity of the engagement the requesting agency has in mind, and therefore does not lend itself to a service catalog menu of offerings and options.
e. Service prerequisites	Customer agency and DAS-PS will enter into an IAA for the provision embedded procurement services staff. Agreement must be approved by the DAS Statewide Procurement Services Manager, DAS EHRS, and the appropriate staff at the requesting agency.
f. (Service-specific) Customer and provider responsibilities	Customer will provide day to day direction and workload management of the embedded employee. Other customer and provider responsibilities will be defined in the interagency agreement that will articulate the specific details of each engagement.
<b>2. How is the service requested?</b>	<b>Description</b>
a. How is this service requested?	Requests for embedded DAS-PS staff should be made directly to a member of the DAS-PS management team. A current listing of DAS-PS staff, including management team members, can be found at: <a href="http://www.oregon.gov/DAS/EGS/ps/Pages/contact_us.aspx">http://www.oregon.gov/DAS/EGS/ps/Pages/contact_us.aspx</a>
b. What forms are used/ needed to request this service?	Initial request can be made in person, or via e-mail. The process to refine the request will involve written communications, and face to face meetings, that ultimately result in an IAA.
c. When can you expect to have your service request fulfilled?	Initial acknowledgement of the request will be within one business day. The DAS-PS manager who receives the request will negotiate timelines with the requestor based on the unique aspects of the request and on the DAS-PS staff available.
<b>3. How do I get help? How does DAS-PS provide support to customers?</b>	<b>Description</b>

a. Self-service support	Contact DAS-PS management for assistance with embedded staffing needs.
b. How to request support	Contact DAS-PS management for assistance with embedded staffing needs.
c. When can you expect to get a response?	Initial response within one business day.

## 8.2. SLA performance measure data dictionaries

### **SLA Metric #1: Percent of contract quality evaluation surveys stating the contract met original business needs.**

- **Description:** Percent of respondents to contract quality evaluation survey who report they feel the contract established by DAS-PS met their original business needs.
- **Purpose:** This is an outcome measure aimed at tracking the average satisfaction of customer agency procurement staff with the degree to which the contract met their business needs. Adequately meeting agency business needs is considered as a critical success factor leading to increased **contract quality**, which was identified as a key attribute in the provision of agency specific contract services

It is expected that tracking and reporting on this measure will assist DAS-PS and program customers to understand and make data-driven decisions in order to improve the quality of the contract development process.

- **Comparability:** No reliable organization or data source for comparison has been identified at this time.
- **Measure calculation formula:**
  - **A = (B / C)\*100**
    - **B=** Number of respondents to contract quality evaluation survey who answer "yes" to specific question ("Did the contract as it was written meet adequately your business needs?") in the measurement period.
    - **C=** Number of responses to contract quality evaluation surveys received in the measurement period.
    - The number of "yes" responses to the question on the survey will be tallied up and divided by the total number of surveys received, and then multiplied by 100 to calculate the percent figure.
- **Detailed measure definition / clarification:**
  - Contract quality evaluation surveys will be sent to the list of designated agency contact staff established for every contract.
  - Surveys will be sent six months after the contracts are signed or after the expiration date for contracts with duration under six months.

- Contract quality evaluation surveys will be sent to customer agencies irrespective of the solicitation process used to award to contract (RFPs, ITB's, sole-source contracts, etc.)
- Contract quality evaluation surveys will include at least the following questions:
  1. Has the contract required any amendment to correct any error since it was signed?
  2. Did the contract include a clear identification of the product or service deliverables that need to be delivered by the vendor?
  3. Did the contract include a clear description of the statement of work that needs to be performed by the vendor?
  4. Did the contract as it was written meet adequately your business needs? (yes / no); if "no", please state why.
- **Baseline:** None.
- **SLE (Quantitative performance target):** 85%.
- **Frequency of reporting / timeliness:** Quarterly.
- **Attachments:** None

- **SLA Metric #2: Percent of contracts completed within the timeframes agreed to with customers.**
  - **Description:** Percent of times DAS-PS meets the contract estimated completion date (E.C.D.) agreed to with the customer agency at the outset of the contract development process.
  - **Purpose:** This measure is tracked to ensure that customer contracts are completed within the timeframes agreed upon by DAS-PS and the customer agency. Timely contract development and completion was identified by DAS-PS customers as an important quality attribute related to the provision of procurement services.
  - **Comparability:** Many divisions or programs within DAS track similar timeliness performance measures, which allows for comparability of performance between different units/ service providers within DAS;
    - ETS tracks and reports tracks and reports the percent of times the division is able to meet the agreed delivery date for standard service requests.
    - DAS Maintenance Services tracks and reports the percent of times the program is able to meet the agreed delivery date for maintenance projects.
    - DAS Publishing and Distribution tracks and reports the percent of times the program is able to meet the agreed delivery date for printing and / or mailing jobs.
  - **Measure calculation formula:**
    - **A = (B/ C) \*100**
    - **B =** Number of contracts signed during the measuring period in which the date of completion preceded or met the CSD agreed with the customer at the outset of the contract development process.

- **C** = Number of contracts signed during measuring period.
- **Detailed measure definition / clarification:**
  - ECD is the date DAS-PS will deliver to the requesting agency a completed, legally sufficient, contract.
  - When a customer submits a PR or a CSR to DAS-PS, the PS staff will propose and negotiate with the customer a contract ECD within 10 business days from the submission of the PR/ contract request.
    1. If a customer submits a desired contract completion date along with the PR, if DAS-PS staff considers the requested date unattainable, they will inform the customer and renegotiate a new date within 10 business days.
    2. Changes to the ECD as a result of customer agencies requests for a change in the scope of the procurement solicitation will not be considered late jobs.
    3. For all other changes to the ECD requested by DAS-PS staff, whether or not the new proposed delivery date impacts customer or not (whether or not changes can be easily accommodated by customer) it will be considered a late job. Examples of reasons for contract signature date changes that will be considered late jobs are:
      - Changes to the scope of the solicitation request not directly related to a change in the scope communicated by the customer agency.
      - Delays in DAS-PS obtaining legal sufficiency review from DOJ.
      - Delays to the award process as a result of vendor protests.
  - This performance measure will be tracked with the aid of DAS-PS workload tracking system or a similar Excel or database file allowing program staff to log the original ECD and the contract final date.
- **Baseline:** None.
- **SLE (Quantitative performance target):** 85%.
- **Frequency of reporting / measurement period:** Quarterly.
- **Attachments:** None.

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**SLA Metric #3: Number of complaints on Statewide Price Agreement vendor performance.**

- **Description:** Number of complaints received from state agency purchasers about specific Statewide Price Agreement vendor performance.
- **Purpose:** The objective for this measure is tracking performance deficiencies of Statewide Price Agreement vendors.

It is expected that tracking and reporting on this measure will assist DAS-PS and the EGS CUB to make data-driven decisions in order to manage performance of Statewide Price Agreement vendors.

- **Comparability:** None at this time. No other EGS or DAS program is tracking customer complaints on vendor performance as a SLA metric.
- **Measure calculation formula:**
  - A = Number of complaints on Statewide Price Agreement vendor performance received from state agencies through the DAS-PS vendor feedback web portal.
- **Detailed measure definition / clarification:**
  - DAS-PS online portal allows state agency purchasers to submit feedback, on vendor performance under Statewide Price Agreements and multi-state cooperative agreements which DAS-PS manages.
  - Complaints related to statewide vendor performance will be one of the feedback checkbox options available to DAS-PS online portal users. Complaints will be categorized and forwarded to assigned contract administrator for resolution.
  - Complaint data will become part of the procurement file and will be used in the overall evaluation of vendor performance at time of contract renewal.
  - **Exclusions:**
    1. Complaints on agency specific contract vendors will be excluded from the data reported for this SLA performance measure.
- **Baseline:** None
- **SLE (Quantitative performance target):** TBD. Agreement to measure and set target at CUB when 12 months (four quarters) worth of data are available.
- **Frequency of reporting / timeliness:** Quarterly.
- **Attachments:** None.

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**SLA Metric #4: Percent of Statewide Price Agreements with “how to buy” guides.**

- **Description:** Percent of Statewide Price Agreement contracts that include a “how to buy” guide accessible via ORPIN.
- **Purpose:** The objective for this measure is to track ease of use of Statewide Price Agreements.
- **Comparability:** No reliable organization or data source for comparison has been identified at this time.
- **Measure calculation formula:**
  - $A = (B/C) * 100$ , where

- B= Number of Statewide Price Agreements that have a “how to buy” guide available through ORPIN.
- C= Total number of Statewide Price Agreements
- **Detailed measure definition / clarification:**
  - “How to buy” guides will need to conform to a standard format / checklist / template (once developed).
  - All Statewide Price Agreements should contain information that instructs authorized purchasers on the most efficient methods of using the price agreement.
  - Exclusions:
    1. Agency specific procurements.
- **Baseline:** None
- **SLE (Quantitative performance target):**
  - 15% by end of Year 1 (June 30, 2015)
  - 25% by end of Year 2 (June 30, 2016)
  - 50% by end of Year 3 (June 30, 2017)
- **Frequency of reporting / timeliness:** Quarterly.
- **Attachments:** “how to buy” template (under development)

**SLA Metric #5: Ease of use of Statewide Price Agreements.**

- **Description:** Average rating of ease of use of Statewide Price Agreements as per customer survey.
- **Purpose:** The objective for this measure is to track ease of use of Statewide Price Agreements as reported by agency DPO or equivalent level agency managers with procurement responsibility.

It is expected that tracking and reporting on this measure will assist DAS-PS and the EGS CUB to make data-driven decisions and identify opportunities to improve usage of Statewide Price Agreements.

- **Comparability:** None identified at this time.
- **Measure calculation formula:**
  - **A =  $\sum B / n$  (number of evaluation surveys)**
  - **B=** Rating (in a scale of 1-10, with 10 being the easiest) to specific question on “ease of use of Statewide Price Agreements” included on surveys completed by DPO’s (or equivalent level manager with procurement authority in agencies that do not have DPOs).
  - **n=** Number of surveys completed by agency DPOs / procurement managers in the measurement period.

- Results (score on “ease of use of Statewide Price Agreement” question) from all surveys received in the measurement period will be added up and divided by the total number of surveys received to calculate the average rating for ease of use of price agreements.
- **Detailed measure definition / clarification:**
  - This measure will be calculated based on data collected through a quarterly survey of agency DPO’s (or equivalent level manager with procurement authority in agencies that do not have DPOs) who have used one or more Statewide Price Agreement in the previous quarter.
  - **Exclusions:**
    1. Agency specific procurement transactions will not be included in survey question.
- **Baseline:** None
- **SLE (Quantitative performance target):** 7.5 (in a 10 point scale).
- **Frequency of reporting / timeliness:** Quarterly.
- **Attachments:** None

**SLA Metric #6: ORPIN help desk effectiveness.**

- **Description:** Average rating of ORPIN help desk staff effectiveness as per customer survey.
- **Purpose:** The objective for this measure is to track effectiveness of ORPIN help desk in providing support to service requests received from customer agencies.

It is expected that tracking and reporting on this measure will assist DAS-PS and the EGS CUB to make data-driven decisions regarding:

- Technical support workflow / processes.
- Resource / workload balancing.
- **Comparability:** No reliable organization or data source for comparison has been identified at this time.
- **Measure calculation formula:**
  - **A =  $\sum B / n$  (number of evaluation surveys)**
  - **B=** Rating (in a scale of 1-10, with 10 being the best) to specific question on “overall, please rate the effectiveness of the help desk in the resolution of your ticket” included on transactional surveys sent to agency customers who have contacted DAS-PS ORPIN help desk to request support.
  - **n=** Number of surveys completed by agency customers in the measurement period.

- Results (score on “effectiveness of ORPIN help desk” question) from all surveys received in the measurement period will be added up and divided by the total number of surveys received to calculate the average rating for.
- **Detailed measure definition / clarification:**
  - This performance measure is tracked as part of the DAS-PS customer satisfaction survey.
  - The survey tool is managed and deployed by DAS Business Services.
  - Surveys are sent weekly to all DAS-PS customers who have requested assistance from the ORPIN help desk in the preceding week. Results are compiled quarterly and reported to the DAS executive team as well as used internally by DAS-PS management to refine program outcomes.
- **Exclusions:**
  1. Survey results from non-state agency users of ORPIN help desk services (vendors, ORCPP members, etc.) will be excluded from the results reported under this measure.

What is Tracked	What is Not Tracked
All service requests from OACs and end-users from state agencies irrespective of the reason for contacting the ORPIN help desk.	All service requests <u>from vendors.</u>
	All service requests from <u>local governments, school districts, etc.</u>
	All service requests from members of the general public.

- **Baseline:** None
- **SLE (quantitative performance target):** 9 (in a 10 point scale).
- **Frequency of reporting / timeliness:** Quarterly.
- **Attachments:** None.

**SLA Metric #7: ORPIN technical support resolution time.**

- **Description:** Average number of hours from receipt of request for ORPIN technical support until customer issue is resolved / ticket is closed.
- **Purpose:** This measure was selected by the SLA team to track timeliness of ORPIN technical support, which was identified by DAS-PS customers as one the critical quality attributes associated with the provision of ORPIN support services.

It is expected that tracking and reporting on this measure will assist DAS, DAS-PS management and customer members of the EGS CUB to manage customer expectations while providing data to understand and make decisions regarding:

- Technical support workflow / processes.
- Resource / workload balancing.
- **Comparability:**
  - As part of its SLA, DAS EHRS tracks timeliness of technical support provided by the help desk staff who support i-Learn and the e-Recruit enterprise systems.
- **Measure calculation formula:**
  - **A=  $\sum (B-C) / n$  (number of tickets)**
    1. Numerator = Total number of hours spent providing support / response to requests for ORPIN technical support. For each request received that meets the eligibility / inclusion criteria outlined below, this is the difference between:
      - B: Date and time technical support is delivered and ticket is closed.
      - C: Date and time of receipt of ticket / request for technical support.
    2. Denominator = n = Total number of tickets / issues resolved that meet the eligibility / inclusion criteria (see table below).
  - Elapsed time is calculated for each request for technical support that meets eligibility / inclusion criteria (see table below). Results will be added up and divided by the number of issues / tickets resolved in a quarter to calculate the average response time.
- **Detailed measure definition / clarification:**
  - This measure is tracked in number of hours.
  - For the purpose of tallying up elapsed time for resolution of service request tickets, only time elapsed within the help desk regular support hours; M-F, 7:30am-4:30pm will be counted.
  - Fractions of one hour will be rounded-up to the next highest 15-minute increment.
  - **Eligibility and exclusions from denominator:** DAS-PS staff will log and track time spent on providing support to ORPIN customer agencies for the following types of tickets sent to ORPIN help desk technical support:

What is Tracked	What is Not Tracked
<ul style="list-style-type: none"> <li>● End user service requests from state agency users whose agencies don't have a designated OAC, including but not limited to:</li> <li>● End user profile fixes / updates.</li> <li>● End user login IDs / Passwords.</li> <li>● Browser issues (compatibility, pop-up blocker issues, etc.)</li> </ul>	<p>All <b><u>end user service requests</u></b> from state agencies (<b><u>whether they are agency customers or ORCPP customers</u></b>) <b><u>if customer agency has a designated OAC</u></b>, including:</p> <ul style="list-style-type: none"> <li>● End user profile fixes/updates.</li> <li>● End user login IDs / Passwords.</li> <li>● Browser issues (compatibility, pop-up blocker issues, etc.)</li> </ul>

	<ul style="list-style-type: none"> <li>• Redirecting end users to agency OAC coordinators</li> </ul>
AdHoc Reports	All service requests <b><u>from vendors</u></b>
OAC consultation / requests for support / advice to resolve issues they can't solve on behalf of their end users	All service request from <b><u>local governments, school districts, etc.</u></b>
	Permissions services (to designate specific groups within customer organization who can access content etc.)
	Hardware Failures
	Connectivity Issues
	ORPIN Software Bugs

- **Baseline:** To be established after four quarters of data collection.
- **SLE (Quantitative performance target):** None at this point; agreement to measure and set target at CUB when 12 months (four quarters) worth of data are available.
- **Frequency of reporting / timeliness:** Quarterly.
- **Attachments:** None.

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**SLA Metric #8: Satisfaction with procurement training.**

- **Description:** Average overall satisfaction rating on evaluation surveys completed by state agency employees who have finished any procurement training course.
- **Purpose:** This measure tracks satisfaction with training sessions conducted by DAS-PS for state employees.

It is expected that tracking and reporting on this measure will assist DAS-PS to understand and make data-driven decisions in order to develop and deliver quality training courses.

Ultimately, sustained procurement training quality is expected to contribute to improve the skills of public employees who spend public funds on goods and services, and to contribute to procurement practices that promote fair, transparent and responsible business practices consistent with Oregon Statutes and Administrative Rules.

- **Comparability:**
  - A few divisions or programs track the quality of the training they provide to their customers, which allow for comparability of performance between training units / providers within DAS:

1. As part of its SLA, EHRS tracks and reports on a similar metric (average satisfaction with training courses) for EHRS developed training content.
  2. As part of its SLA, DAS Risk Management tracks and reports on the average rating received by attendees to safety training courses.
- **Measure calculation formula:**
    - **A =  $\sum B / n$  (number of training evaluation surveys)**
      - **B=** Rating (in a scale of 1-10, with 10 being the best) to specific question on “overall satisfaction with training received” included on training evaluation surveys completed by state employees who have finished any procurement training course in the measurement period.
      - **n=** number of training evaluation surveys completed by state employees in the measurement period.
      - Results (score on “overall satisfaction with training received” question) from all evaluation surveys received in the measurement period for any training course delivered to state employees will be added up and divided by the total number of evaluation surveys received to calculate the average rating for quality of training.
  - **Detailed measure definition / clarification:**
    - Rating based on a 1-10 point scale, with 10 being best.
    - Completion of evaluations at the end of each training course is voluntarily submitted. DAS-PS will strive to submit a training evaluation survey to all state employees who have completed a training course in order to gather quantitative and qualitative feedback on the training received.
    - **Exclusions:**
      1. Training satisfaction ratings will be tracked only for state employees, excluding vendor employees or employees from ORCPP organizations such as counties or municipalities.
  - **Baseline:** None.
  - **SLE (quantitative performance target):** 8 (in a 10 point scale).
  - **Frequency of reporting / timeliness:** Quarterly.
  - **Attachments:** None

### 8.3. Rate methodologies

2013/15 Rate methodologies:

- **Central Government Service Charge.**  
DAS-PS assesses a portion of the total costs of running PS to agencies based on the number of FTE positions each agency is authorized for in the 2013-15 biennial budget.
- **Oregon Cooperative Procurement Program (ORCPP) User Fee.**  
Biennial fee assessed to members of ORCPP based on member’s total budget.

- **Vendor Collected Administrative Fee (VCAF).**  
Percent charged per purchases made by state agency or ORCPP members from Statewide Price Agreements maintained by DAS-PS.
- **Statewide Training Program.**  
Fee charged per attendee at DAS-PS training classes or other DAS-PS sponsored event.

Beginning with 2015/17, DAS-PS adopted a new rate development process that enables the successive refinement of budget planning and rate development.

The objectives included:

- To develop rates that represent the true cost of delivering a service.
- To foster the “business within a business” philosophy within the DAS-PS organization.
- To develop documentation that is transparent so that rates can be scrutinized internally and externally.
- To use a process of successive refinement for budget planning and rate development.
- A complete description of the methodology for DAS-PS rates can be found by following the link below: [Procurement Services \(PS\) 2015 -17 Rate Methodology](#).

The charges for 2015-2017 procurement services are based on levels of activity during the FY 2012 and FY 2013. The charges for all DAS services are based on the projected needs of the agency’s FTE positions and current legislative approved program. If activities or levels of service change, DAS or the agency may request renegotiation of this agreement to ensure continued uninterrupted service and cost recovery to DAS.