



# Enterprise Leadership Team Improving Government Sub-Committee Project Charter

<b>Title</b>	Streamlined Procurement Policy and Procedure Manual
<b>Sponsors</b>	Improving Government Sponsor: Margaret Van Vliet DAS Business Sponsor: George Naughton, DAS DOJ Business Sponsor: Mark Williams, DOJ
<b>Project Manager &amp; Business Leads</b>	Joel Metlen, Project Manager, DCBS Sarah Roth, Business Lead, CPO, Secretary of State
<b>Problem Statement</b>	<p>Government procurement in Oregon is a complex process subject to numerous statutes, administrative rules, policies, and procedures, and the thousands of state and local government employees who handle procurement for their employers have widely varying levels of procurement knowledge and experience. Further complicating matters, the procurement laws, rules, policies, and procedures are not organized in a streamlined, efficient manner, and different organizations adhere to different rules.</p> <p>Currently, the state does not have a procurement manual. The complexity of the procurement process, frequent changes in statute and administrative rule, and lack of an authoritative manual creates confusion, the need for extensive cross-referencing, misperceptions about available flexibility, and inconsistent work. These issues reportedly reduce efficiency, increase turnaround times and costs, cause unnecessary complications, and impair transparency for vendors and the public.</p>
<b>Project Purpose</b>	<p>In alignment with the state's overall efforts to improve government services, streamline processes, and encourage collaboration among agencies, the purpose of this project is to create a website that will act as the framework for an electronically accessible, user-friendly, enterprise-wide procurement policy and procedure manual. This policy and procedure manual will be the central repository for information and materials relevant to the procurement process for state agencies and possibly local Oregon governments.</p> <p>A centralized manual will foster best practices, help stakeholders navigate the process, eliminate the need for excessive cross-referencing, clear up misperceptions and confusion, provide access to necessary templates, forms, and checklists, set internal and vendor expectations, ensure consistency of work, mitigate risk, and increase process efficiency.</p> <p>This project aims to create the framework for the resources mentioned in recommendation two<sup>1</sup> and parts 1 and 2 of recommendation eight<sup>2</sup> of the "Enterprise Procurement Improvements Final Report" issued by Ikaso Consulting LLC in June 2013.</p>

<sup>1</sup> Implement Internal and Supplier Policy and Procedure Manuals

<sup>2</sup> Streamline Procurement Rules (Part 1: create comprehensive rule reference guide; Part 2: create stand alone rules document)



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### Scope

The project team will create a website that will function as the framework for an enterprise-wide procurement policy and procedure manual. This includes determining the types of content that the manual will contain as well as the website's look, feel, navigation, and structure.

The project team will also establish a system of governance for the ongoing development and maintenance of website following the end of this project. The governance system will include ownership, roles and responsibilities, and a clearly defined process for creating, integrating, and maintaining content to ensure the website eventually becomes the primary, comprehensive resource for the state procurement community.

This project will not include changing or amending any laws or rules (Part 3 of recommendation eight of the Ikaso report) or the creation of new or revised policies, procedures, templates, forms, or checklists. However, these improvement activities can be chartered as separate work efforts or projects in parallel with this manual project.

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The project team will include subject matter experts from across the enterprise of state agencies and include the procurement manual project team already developed by the Designated Procurement Officer (DPO) Advisory Council and sponsored by the DAS Chief Procurement Officer. This project will build upon the current manual team's work. As needed, the project team will elicit input and support from relevant communications specialists, stakeholders, partners, and various end users throughout the project.

The project team will:

1. Identify and engage SMEs and stakeholders, including from procurement, IT, and other integral stakeholder groups;
2. Collect resources, including peer manuals for review, and conduct research on online manuals, knowledge bases, and websites;
3. Review the current procurement manual team's progress and determine how to incorporate existing project structure, plans, workgroups, workflows, procedures, performance metrics, and deliverables;
4. Establish a timeline and deliverables schedule;
5. Identify top user tasks
6. Review other websites for content and design
7. Perform user card sort usability tests and seek input from other levels of project governance to resolve differences in card sort results
8. Begin to develop customer flow through website structure
9. Fill out the E-Gov Board's Agency Self-Design Form
10. Develop wireframing
11. Begin the process of design
12. Perform prototype usability tests

### Project Approach & Duration



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13. Develop governance rules
14. Write the final content strategy
15. Train staff in plain language
16. Write new content
17. Submit site for E-Governance Board approval
18. Go-live
19. Employ governance through workflow
20. Publish, publicize, and provide training according to communication plan;
21. Transition from project to operational status.

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The project team will aim to have the website operational by December 31, 2015.

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### **Expected Outcomes**

The project team will create a website using the state E-Governance Board's DIY process that will function as the framework for a procurement policy and procedure manual for state agencies. A process will be put in place before the completion of this project to continually develop, integrate, and maintain content in the framework, to ensure the manual continues to grow increasingly comprehensive over time. The manual will become a central repository for procurement related information and materials for the state, including the deliverables currently in development by other, related procurement improvement projects, and a repository of archived and outdated processes, policies, rules, and statutes. As the ultimate resource for the procurement community, the manual will improve efficiency and consistency.

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### **Customer Impact**

The procurement community in the State of Oregon such as the Designated Procurement Officer (DPO) Council, DAS Procurement Services, DAS Procurement Policy, Agency Procurement and Contract Specialists, and the Department of Justice (DOJ), are stakeholders in this project. Upon project completion, customers will have a single, streamlined resource to use to collect, house, and access all relevant procurement-related information and materials. A single resource will help them save time and produce higher quality work. The state will also be able to provide vendors with more consistent and reliable information about the process.

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### **Key Stakeholders**

As mentioned above, key stakeholders are the procurement community in the State of Oregon. The project team will identify these stakeholders and analyze the best ways to keep them informed and engaged. The project team will use already existing stakeholder groups, the Enterprise Leadership Team, and the Improving Government Sub-Committee for outreach.

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### **Engagement Planning**

This project will be governed by the Procurement Project Governance Diagram below. The project teams will build stakeholder engagement opportunities into the project plan and will provide regular communication and opportunities for participation on project work groups.

The project team will use this governance structure to manage, assign, and elevate issues and roadblocks that arise during this and the related procurement projects to ensure proper stakeholders are engaged and utilized to resolve problems in an

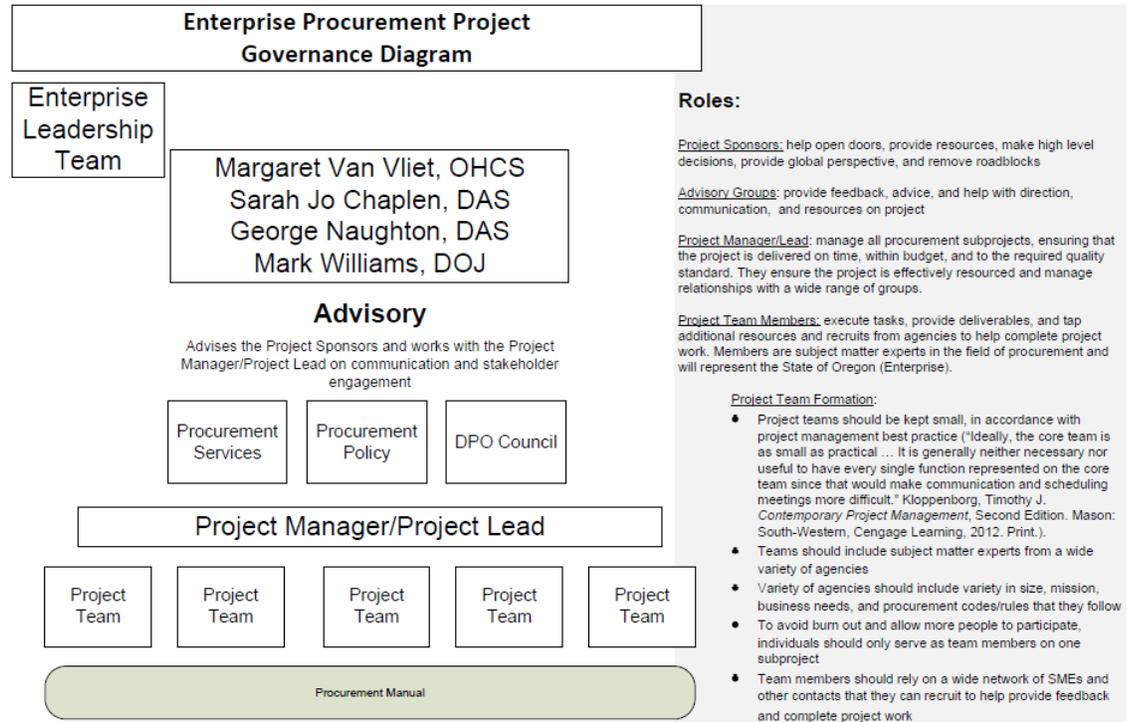
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efficient and timely manner.



As a project sponsored by the Improving Government Steering Committee, this project will be primarily resourced through outreach with the enterprise of state agencies. The primary resource needs are as follows:

- 1) **Electronic platform:** the current procurement manual team has researched software solutions, performed outreach to various vendors, and made the determination that the best option is Microsoft SharePoint because:
  - a) The State has selected SharePoint as the platform for its new and redesigned websites, and using it will ensure that the manual matches the new look and feel of other state websites;
  - b) Unlike most other platforms, there are no additional costs associated with using SharePoint, since the State already has a contract in place;
  - c) The State has already begun to develop significant in-house SharePoint expertise that will be of use to this project.
  - d) The State's contractor, NIC USA, has already developed standard website templates and web parts that will provide most of the functionality needed for the manual;
- 2) **Custom applications:** Any additional web parts or applications needed can be developed by NIC USA as part of its existing contract for no additional cost to the state. If for some reason NIC USA can't provide the web parts or applications in a timely manner, the Department of Administrative Services has

### Funding & Resources



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agreed to provide funding for applications and web parts through 3<sup>rd</sup> parties.

- 3) Expertise: This project requires expertise in SharePoint, web design, procurement, and project management. Internal state resources can provide most of this expertise. NIC USA will provide technical expertise in SharePoint, and to obtain some outside perspective on the manual's development, the Department of Administrative Services will also consider procuring experts with web design or communications backgrounds.
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Due to the complexity of the laws, rules, procedures, and policies, creating a streamlined procurement manual is a substantial undertaking. Buy-in from stakeholders across the enterprise and adequate volunteer services are crucial to ensuring the timely completion of this project. While the current manual team has contributed significant time and effort to completing the manual, their project has fallen behind schedule because of the considerable workload entailed, and this project may suffer a similar fate, despite the additional resources provided by the Improving Government Steering Committee.

Failure to properly maintain the manual, updating it with changes to procedures, policies, law, and rules, in a timely manner after the completion of this project would also reduce its usefulness.

### Major Project Risks

In addition, this project must share project team resources with several other associated projects, and a lack of resources for all projects could cause significant project delays. The outcomes of those associated projects will also directly impact this project. Changes in laws, rules, procedures, policies, and documents will necessitate revisions throughout the manual as its being developed. This could lead to oversights, errors, or outdated information from the start of the project.

An incomplete or inaccurate guide will have little use to the entire procurement community and possibly create confusion for staff. This project will develop the framework for the manual, but the manual will only serve the intended purpose if the state continues to develop and integrate content into the framework in a timely manner.

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Risks of not doing this project include continued confusion for procurement staff, the need for extensive cross-referencing, misperceptions about available flexibility, inconsistent work that may not comply with legal requirements, inefficient processes, long turnaround times, and a lack of consistency and transparency for vendors and the public.

### Risks of not doing the project

The manual is intended to house all of the deliverables from all other related procurement improvement projects. As a delivery system, it will act as the primary resource for the procurement community to find the tools and information they need. If the manual is not adequately completed or page implementation is delayed, those deliverables will need to be housed elsewhere. Alternative locations could make it

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more difficult to keep those deliverables up-to-date, easily accessible, and of maximum benefit for procurement staff. The success of this project is critical to the success of those other related projects.

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**Sponsor  
Approval  
Signature**

Signed \_\_\_\_\_  
Margaret Van Vliet

\_\_\_\_\_  
Date

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**Sponsor  
Approval  
Signature**

Signed \_\_\_\_\_  
Sarah Jo Chaplen

\_\_\_\_\_  
Date

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**Sponsor  
Approval  
Signature**

Signed \_\_\_\_\_  
Mark Williams

\_\_\_\_\_  
Date

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**Approved Project Change Requests:**

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<b><i>Change #</i></b>	<b><i>Date</i></b>	<b><i>Person</i></b>	<b><i>Change Description</i></b>
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