



We are in the People Business

Connie Plowman, PMP

2016 Oregon Project Management Summit - Taking it to the Next Level

OVERVIEW



GETTING ACQUAINTED



PMI AND TALENT TRIANGLE



COMMUNICATING



TEAM BUILDING



ENGAGING STAKEHOLDERS



SOLVING PROBLEMS



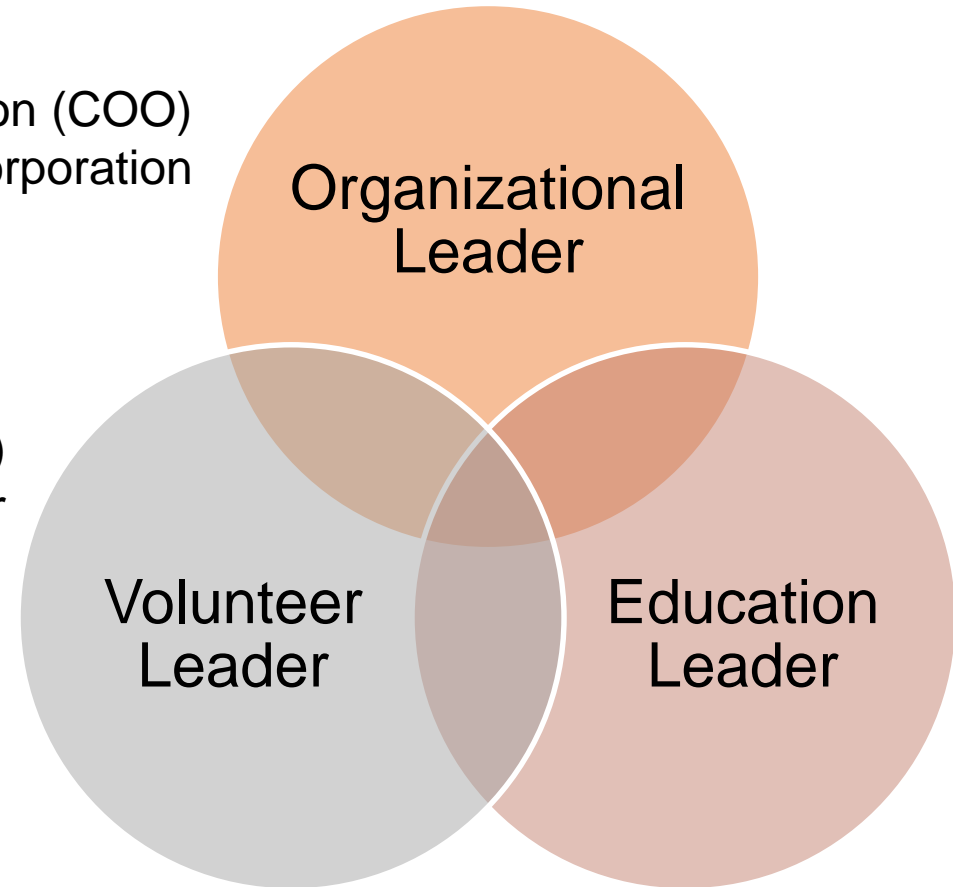
BEING A LEADER



WRAP-UP, QUESTIONS

Cadence Management Corporation (COO)
IBM Corporation

Project Management Institute (PMI)
Job Seekers and Mentor

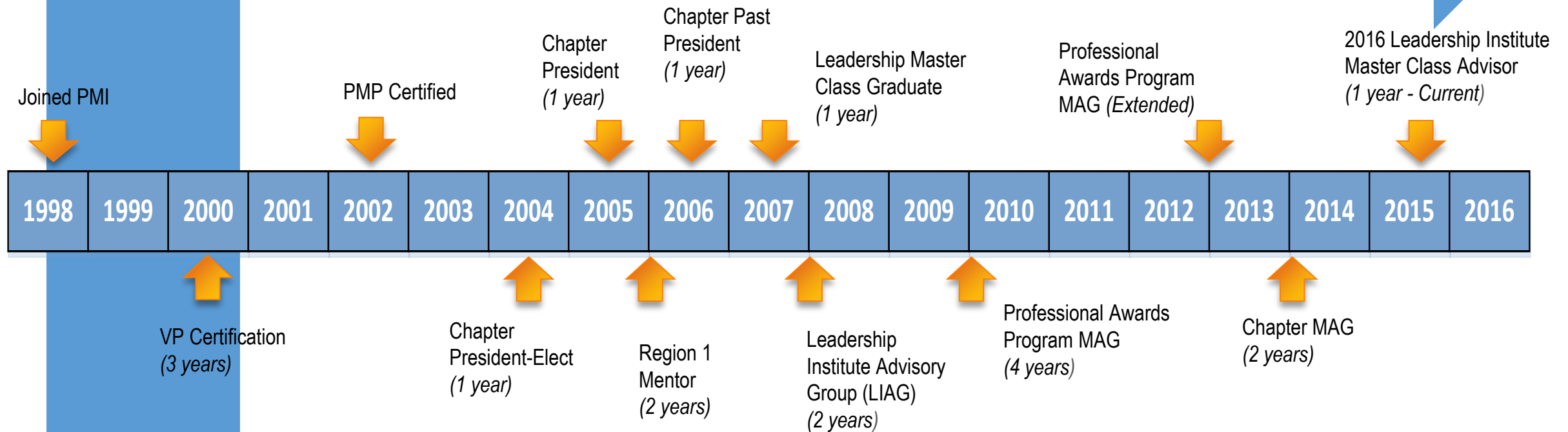


Interim Executive Director,
Portland Community College (PCC),
CLIMB Center for Advancement

Part-time Instructor for PM classes

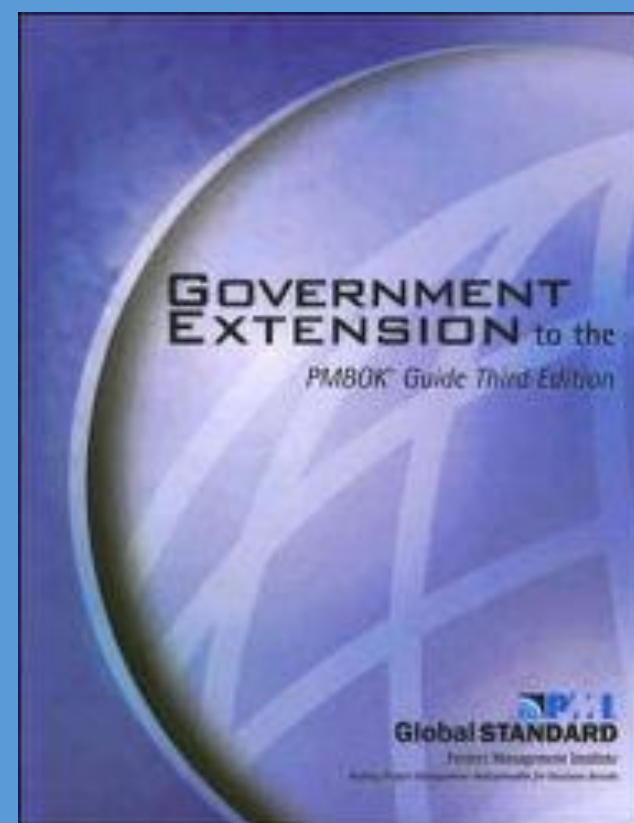
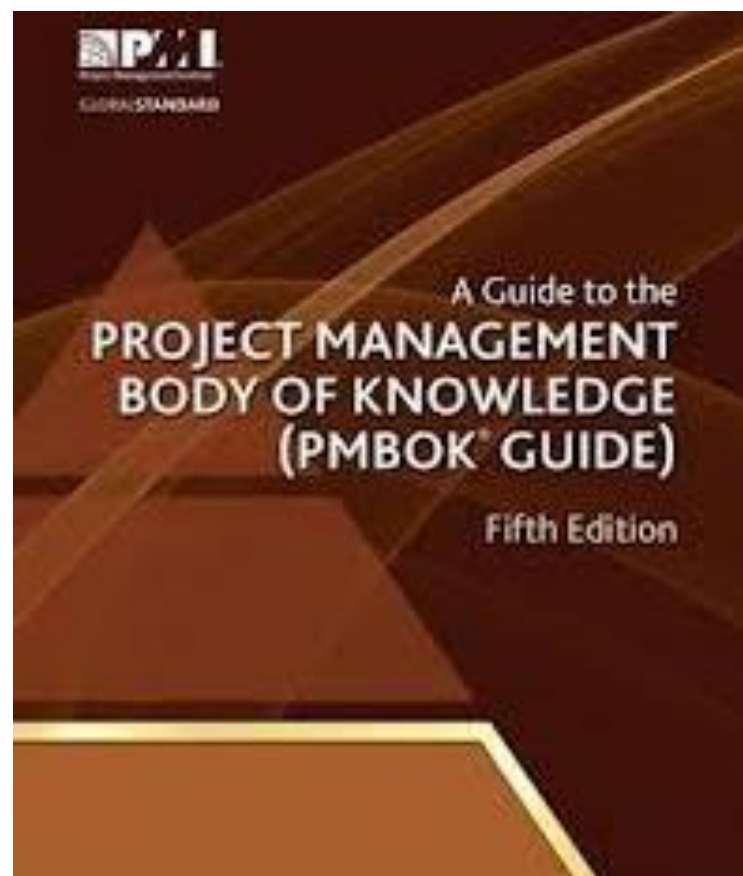
Meet Connie

My PMI Leadership Journey



MAG = Member Advisory Group

Continue to serve on numerous committees, task force groups, mentor, and speaker.



75% of organizations rank project manager leadership skills as most important for the successful navigation of complexity in projects.

—Pulse of the Profession®
In-Depth Report: Navigating Complexity
2013, PMI

PMI Career Central:
<https://pathpro.pmi.org/>

PMI Talent Triangle

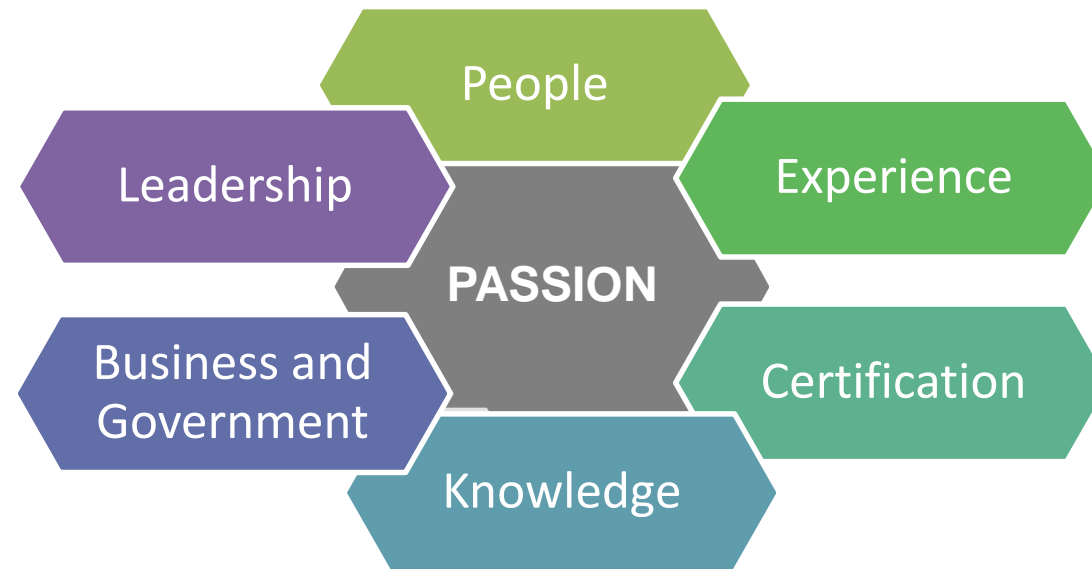


Today's Project Manager

Core Competencies

AT A GLANCE

**What Project Managers
need today to be successful**



Today's PM must be a LEADER	Today's PM must understand BUSINESS and GOVERNMENT	Today's PM must be a CONTINUOUS LEARNER	Today's PM must be committed to the PROFESSION	Today's PM must have extensive EXPERIENCE	Today's PM is in the "PEOPLE BUSINESS"
Decision maker, lead by example, have integrity	Strategic thinker, organization's goals	Skills training, ongoing education	PMI Certification: PMP®, CAPM®	Different size projects & complexity	Stakeholders, project teams, communicator
Goal setting, results driven, be accountable	Finance, customer & internal needs	PM terminology, PM best practices	Program Mgmt, Agile, other PMI certifications	Virtual teams, global projects	Motivate, inspire, reward and recognize
Ask questions, active listener, follow-through	Industry, funding, regulations, standards	Sales skills, continuous improvement	Industry and technical certifications	Diversity in viewpoints, backgrounds, teams, cultures	Relationship builder, influencer, get buy-in
Project leader and business leader	Culture, trends	Project close-out: use Lessons Learned	Volunteer projects, contribute your expertise	Proven success on projects and teams	Maximize everyone's strengths

COMMUNICATING

DWYSYWD

Forming

Storming

Norming

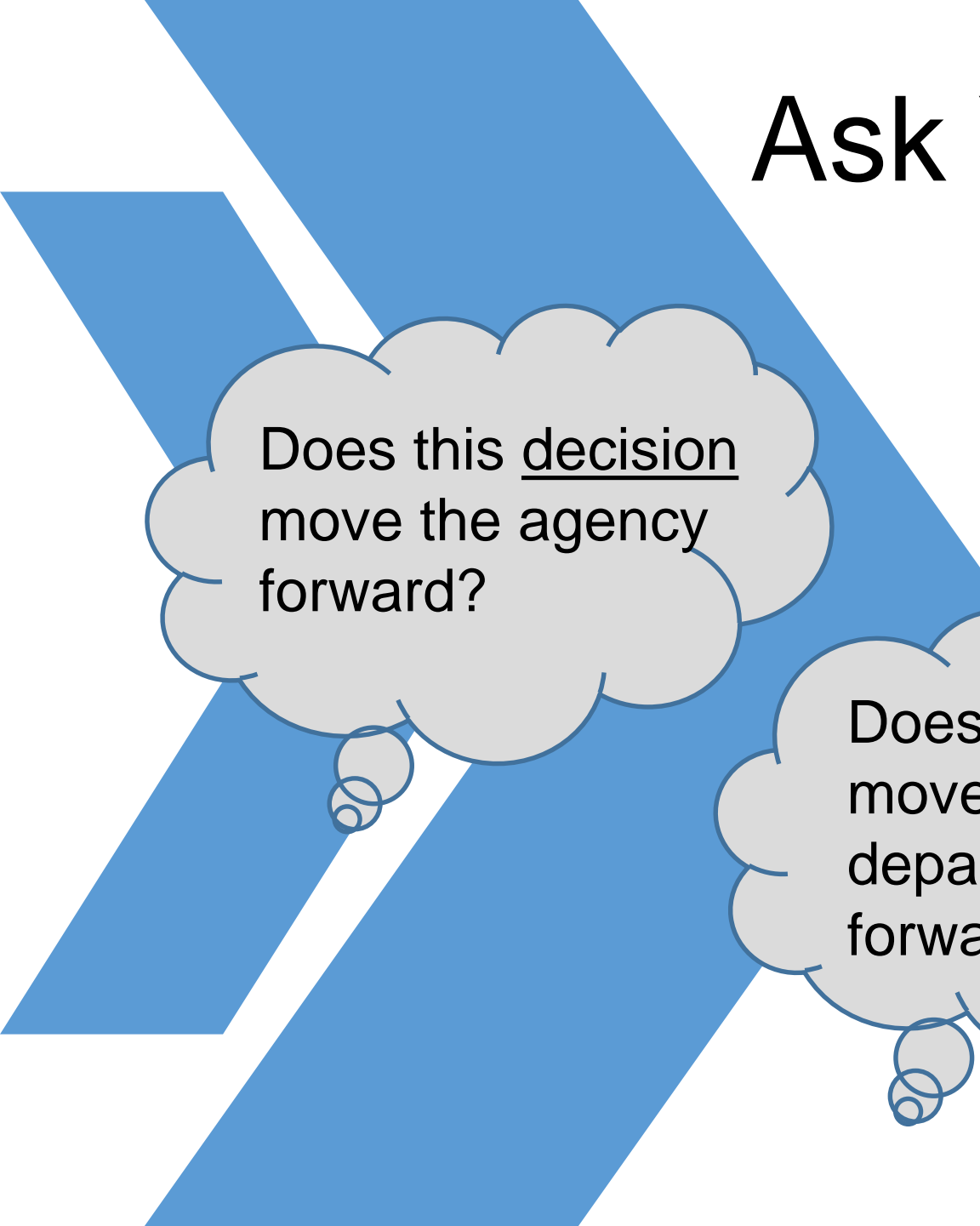
Performing

Adjourning



Where are you?

Ask Yourself:



Does this decision move the agency forward?

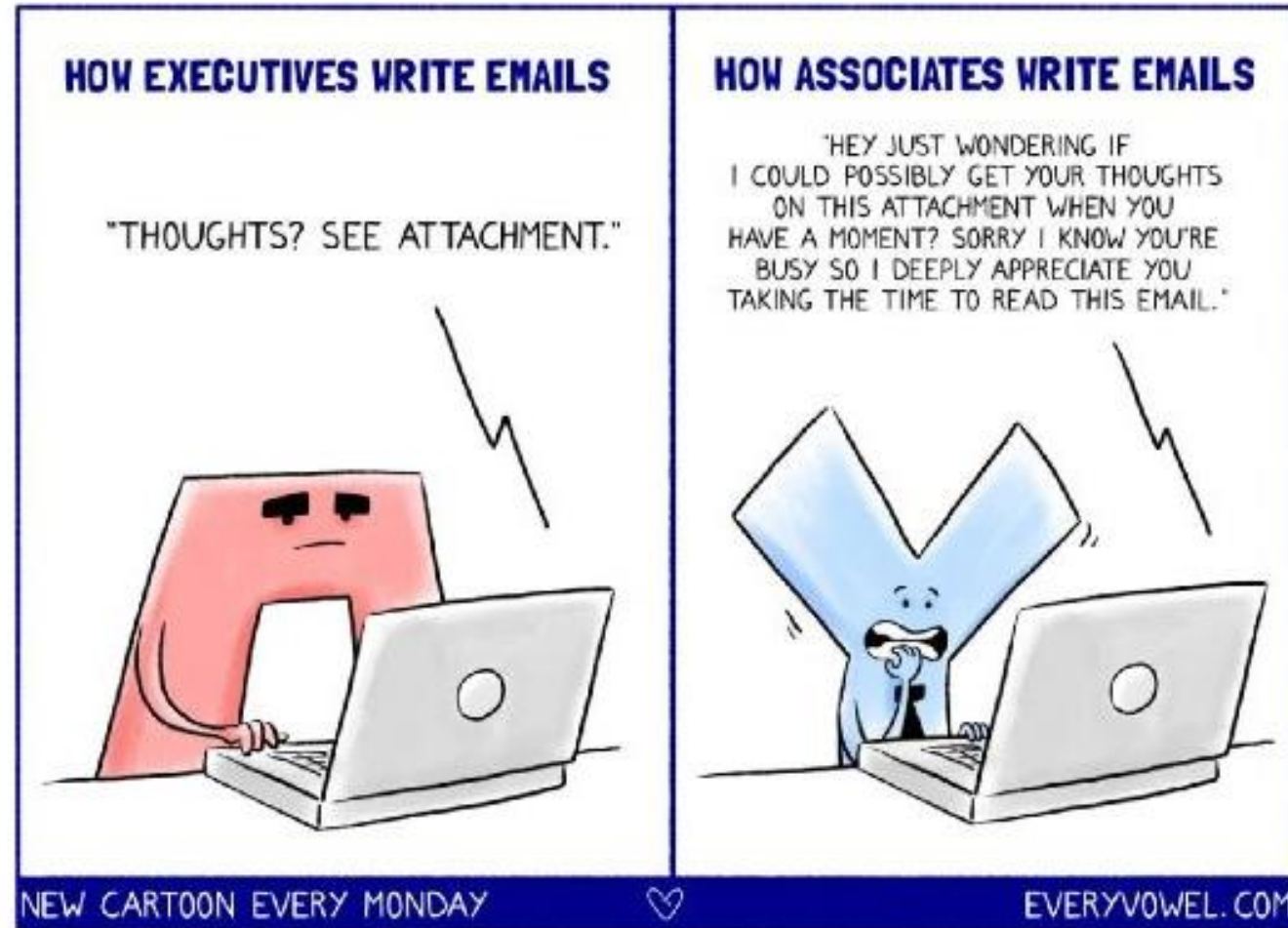
Does this action move the department forward?

Does this behavior show that I am a leader?

My email rule



Write in a simple style using plain language



Make your point and then stop talking

Here's my point...



(now stop talking!)

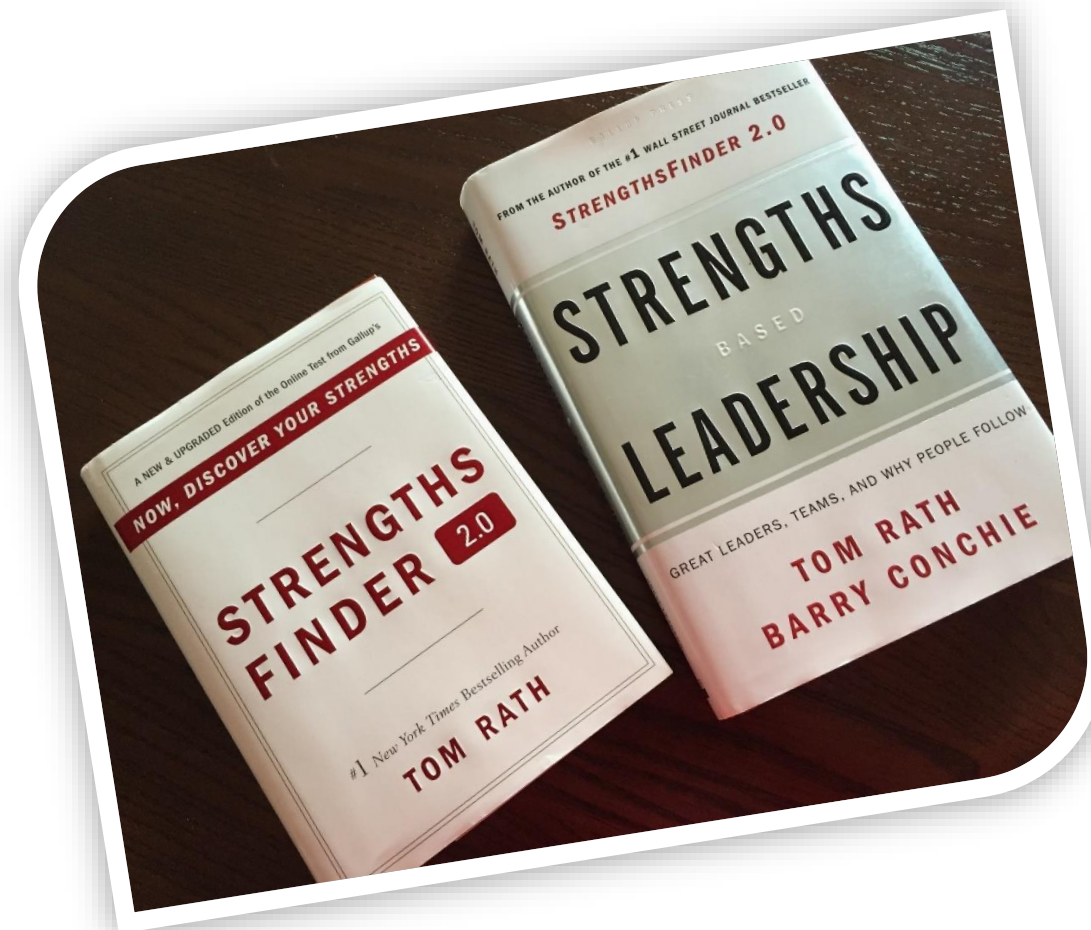
Listen with your eyes
as well as your ears





TEAM BUILDING

Team Building Exercise



What are our STRENGTHS?

	SAM	CONNIE	JOE	JUDY	KEVIN
Achiever		X		X	
Activator	X				
Arranger	X				X
Belief					X
Empathy			X		
Focus		X			
Harmony		X			
Ideation				X	
Individualization	X				X
Input		X			
Intellection			X	X	
Learner	X			X	
Maximizer		X			
Relator	X		X		X
Responsibility			X	X	
Strategic			X		X

What kind of leader are you?



Executing
Leader



Influencing
Leader



Relationship
Building Leader



Strategic
Thinking
Leader

My Strengths

Executing Leader	Influencing Leader	Relationship Building Leader	Strategic Thinker Leader
Achiever	Activator	Adaptability	Analytical
Arranger	Command	Developer	Context
Belief	Communication	Connectedness	Futuristic
Consistency	Competition	Empathy	Ideation
Deliberative	Maximizer	Harmony	Input
Discipline	Self-Assurance	Includer	Intellection
Focus	Significance	Individualization	Learner
Responsibility	Woo	Positivity	Strategic
Restorative		Relator	

What types of LEADERS are we?

	EXECUTING Leaders	INFLUENCING Leaders	RELATIONSHIP BUILDING Leaders	STRATEGIC THINKER Leaders
SAM	Arranger	Activator	Individualization Relator	Learner
CONNIE	Achiever Focus	Maximizer	Harmony	Input
JOE	Responsibility		Empathy Relator	Intellection Strategic
JUDY	Achiever Responsibility			Ideation Intellection Strategic
KEVIN	Arranger Belief		Individualization Relator	Strategic

Aligning Expectations

Here is what you can expect from me as your Project Manager.	What should I expect from you as a Team Member?	What are your expectations of each other, as Team Members?
1	1	1
2	2	2
3	3	3
More...	More...	More...

Is there anything else I should consider?

Here are some additional thoughts....

Is there anything else we should consider?

SAMPLE

Use in any
team setting

ONE PAGE.

Document is signed by everyone.

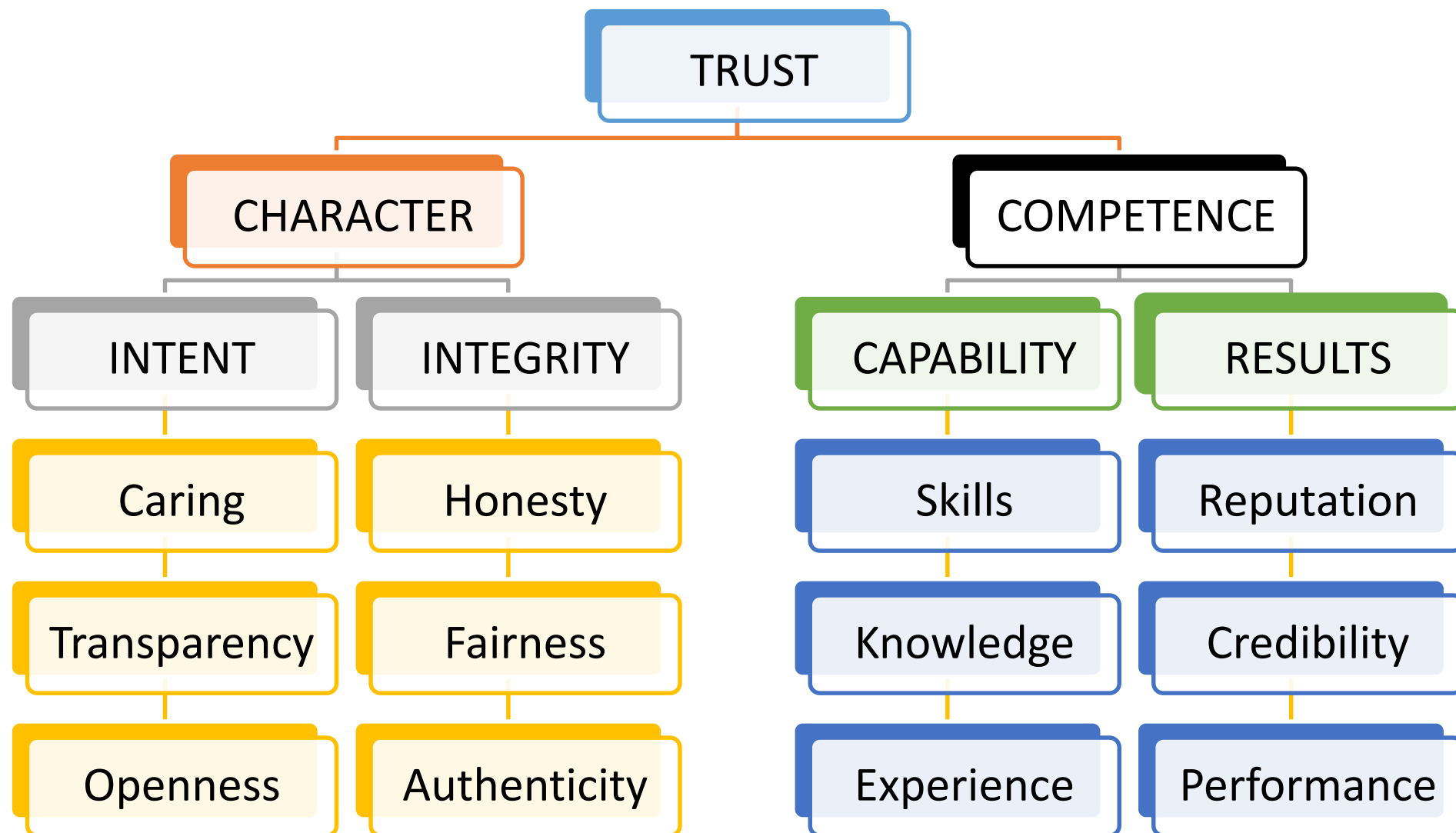
Posted for ease of reference.

Shared Expectations

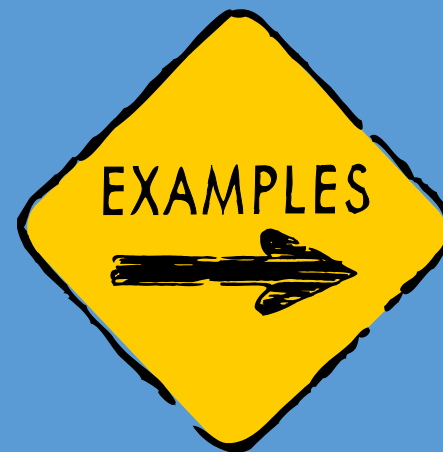
Between Project Manager and Project Team

In starting together on this project and as a unified project team, our commitments to each other are listed below. This is in addition to our roles identified in the project plan, and ground rules for meetings.

What are your expectations of me as the Project Manager?	What are my expectations of you as Team Members?	What are your expectations of each other as Team Members?
To provide the leadership to get the project done on time, within budget, and meet performance	To take ownership and understand your part of the project	To respect and help one another
To set clear goals/objectives	To complete your tasks on time and deliver with high quality	To know that we are depending on each other to get our work done on time
To remove barriers	To identify obstacles in advance, to be proactive	To solve problems at the lowest possible level
To encourage participation	To be an active participant	To be an engaging team member
To have open and honest discussions	To face the brutal facts, and be willing to address them	To work towards solving problems as a team, not as individuals
To clearly communicate internal and external impacts to the project	To stay informed of the Issues Log and Decision Log to avoid repeating	To close-out issues as effectively and timely as possible
To trust and respect us as project team members	To trust and respect me as your project manager and leader	To be worthy of your trust and respect, and not abuse it
To respect our time by starting meetings on time and ending on time	To attend meetings on time and be prepared for the discussion	To be knowledgeable for one another, if a team member is absent



Be the Example



YOU!

Watch out – you are being watched!



TOP 10 THINGS THAT REQUIRE ZERO TALENT:

1. Being on time
2. Work ethic
3. Effort
4. Body language
5. Energy
6. Attitude
7. Passion
8. Being coachable
9. Doing extra
10. Being prepared

How do you know if you have the right people on your bus?

Characteristics to look for:

- Shares the **core values**.
- Does **not need to be managed**.
- Desires to be the **BEST**.
- Knows the difference between **a job and a responsibility**.
- If this were a hiring decision, and knowing what you know now, would you **make the same hiring decision**?



Ask for help when you need it

- Don't be afraid to reach out to others.
- Get a Mentor.
- Be a Mentor.





ENGAGING STAKEHOLDERS

Unaware

Resistant

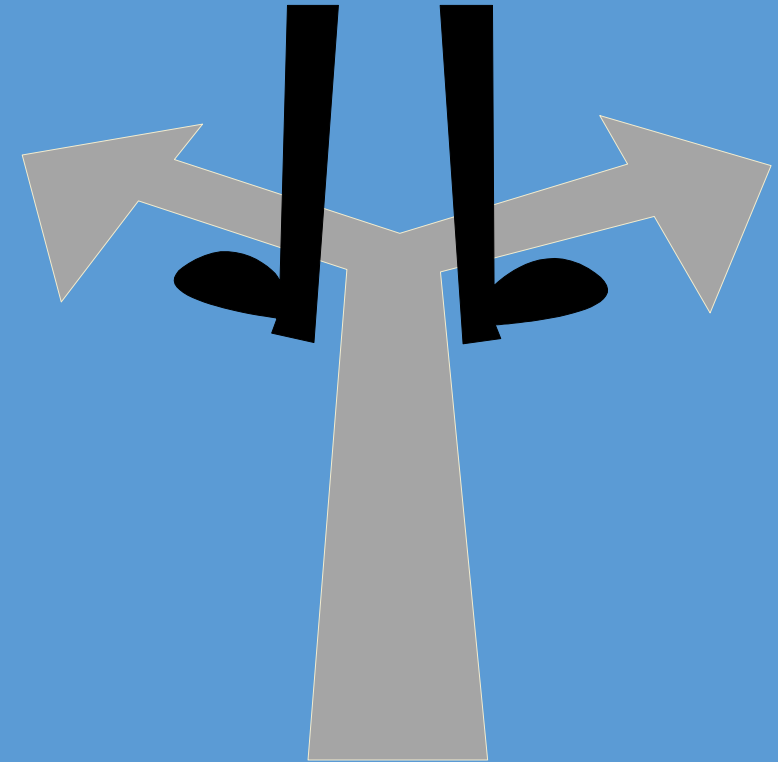
Neutral

Supportive

Leading

Stakeholder Engagement

Understand
different points
of view



Equation for Change

Vision	+	Skills	+	Incentive	+	Resource	+	Action Plan	=	CHANGE
x	+	Skills	+	Incentive	+	Resource	+	Action Plan	=	Confusion
Vision	+	x	+	Incentive	+	Resource	+	Action Plan	=	Anxiety
Vision	+	Skills	+	x	+	Resource	+	Action Plan	=	Gradual Change
Vision	+	Skills	+	Incentive	+	x	+	Action Plan	=	Frustration
Vision	+	Skills	+	Incentive	+	Resource	+	x	=	False Start

Accept **responsibility** for your actions.

Be **accountable** for your results.

Take **ownership** of your mistakes.

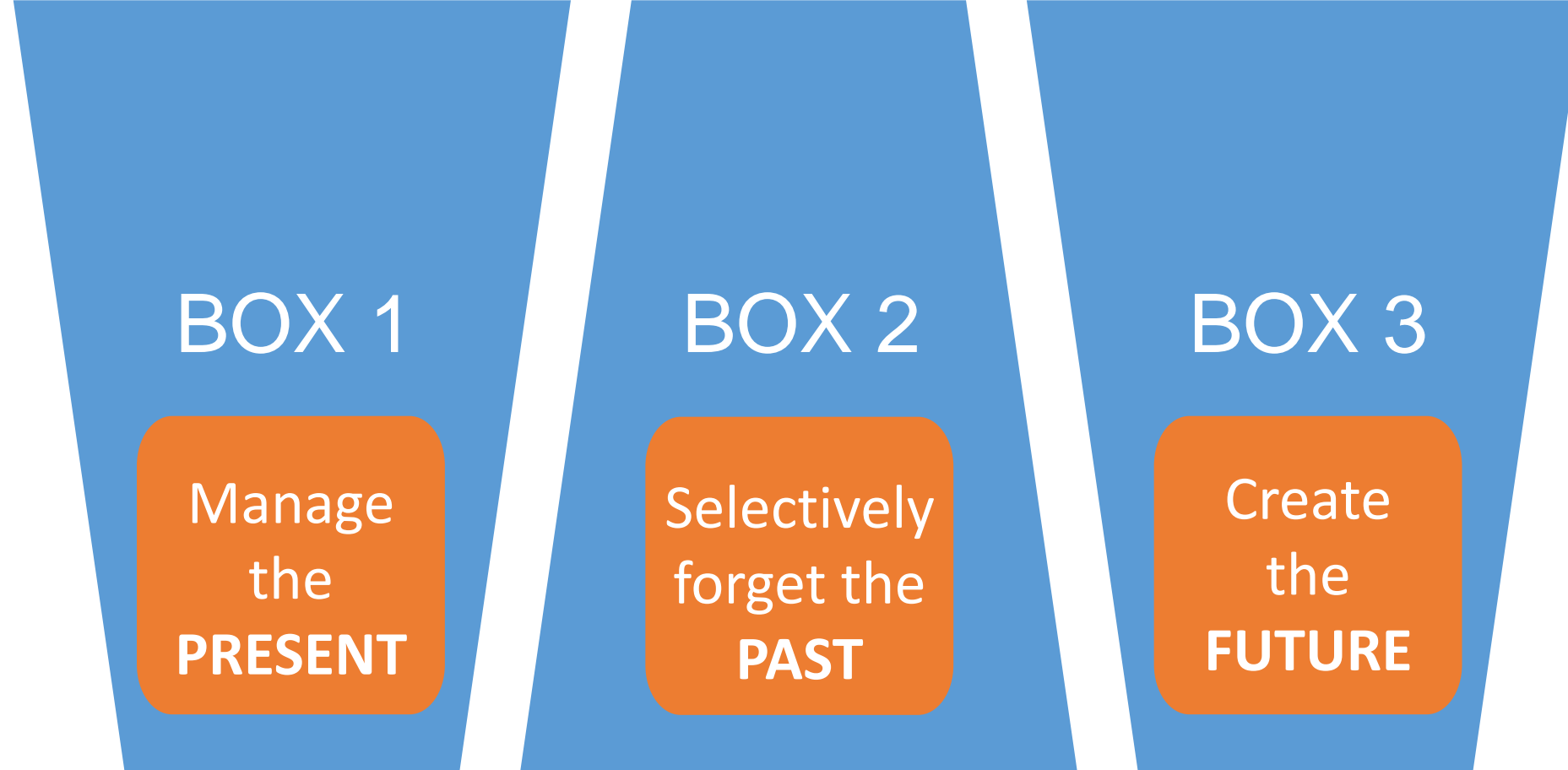
One more
thought

PROBLEM SOLVING

Six Thinking Hats



BEING A LEADER



3-Box Approach

Do you lead or do you manage - or both?

LEADER	MANAGER
Creates the strategy	Transforms strategy into action
Communicates and delivers the vision	Follows the vision
Mentors and coaches	Trains
Asks why	Asks what
Plans long term	Plans short term
Looks into the future	Works in the present
Motivates and inspires	Administers and controls
Focuses on people	Focuses on systems and processes
Aligns people	Organizes people
Encourages and embraces change	Implements change

Set targets for personal growth

	Agency or Government Knowledge	Project Management	Functional Skills	Leadership or Management
Short Term Goals (1 to 6 months)				
Mid-Term Goals (6 months to 1 year)				
Long-Term Goals (Greater than 1 year)				

- Have a passion for learning.
- Invest in yourself.
- Have a plan.



Remember. . . .

**Titles don't make
leaders.**

Actions do.

- Unknown

Make people
your main
business



“Whether you realize it or not, you have the power to be successful.”

– David Cottrell



Thank You!

CONNIE PLOWMAN, PMP

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Questions ???

WHAT

WHY

WHERE

WHEN

WHO

HOW



IT GOVERNANCE

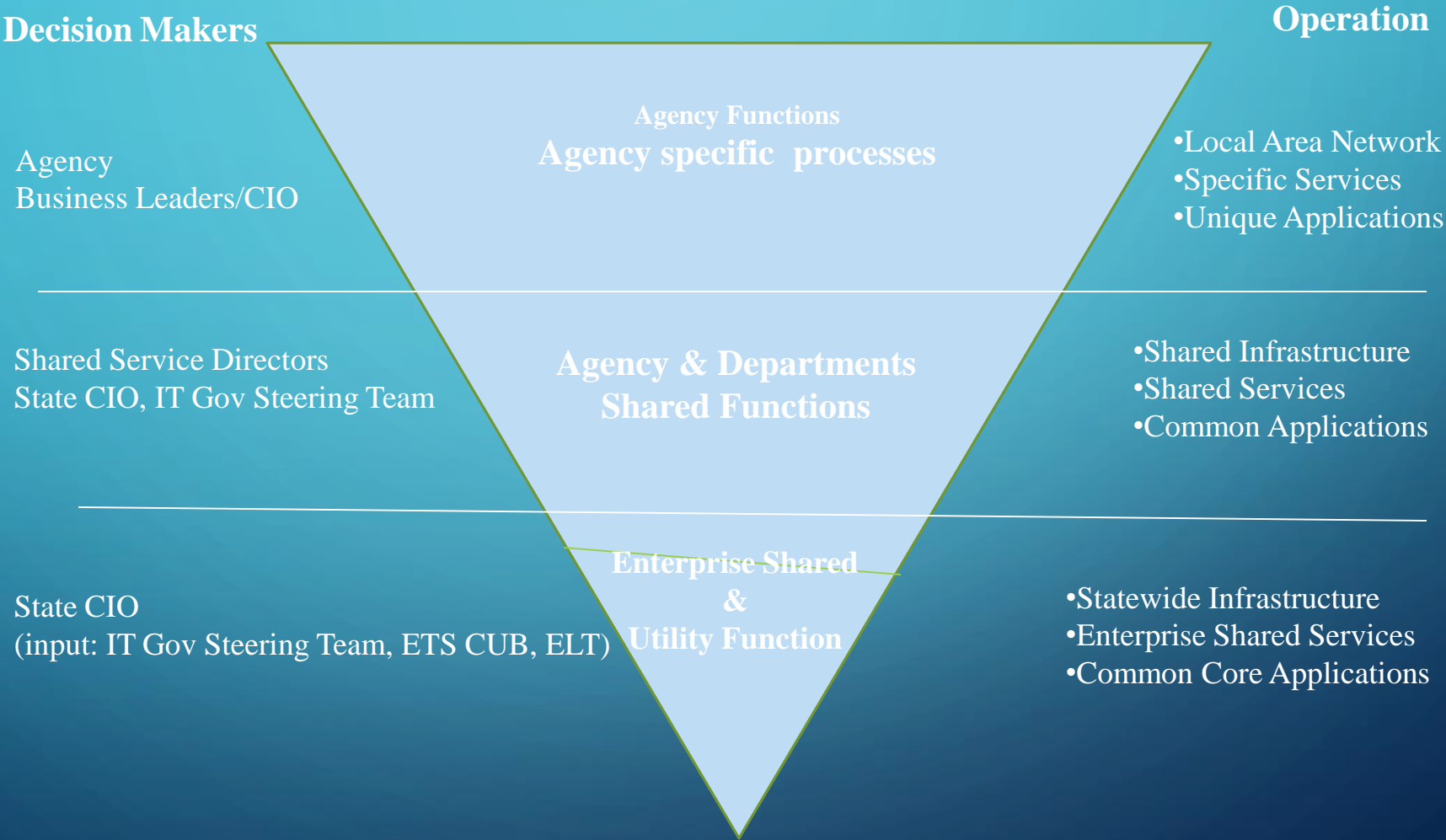
WORKING WITH THE OFFICE OF THE STATE CIO

JENNIFER L. BJERKE
DIRECTOR, STRATEGIC TECHNOLOGY
OFFICE OF THE STATE CHIEF INFORMATION OFFICER

ENTERPRISE INFORMATION TECHNOLOGY GOVERNANCE



Balanced Enterprise IT Governance Framework



EXPECTED RESULTS

Implementation of the IT governance framework to:

- increase enterprise IT compliance & coordination
- reduce system duplication
- align technology solutions
- streamline IT portfolio management

Governor/CIO/COO

Enterprise Leadership Team
IT Governance Board
Customer Utility Board

Shared Services

Public Safety

**Darren
Wellington**

Health & Human
Services

**Ethan
Benatan**

Healthy
Environments

**Darrell
Landrum**

Transportation &
Economic
Development

Jared Choc

Education

Ben Tate

State Admin

**Heidi
Zinsmann**

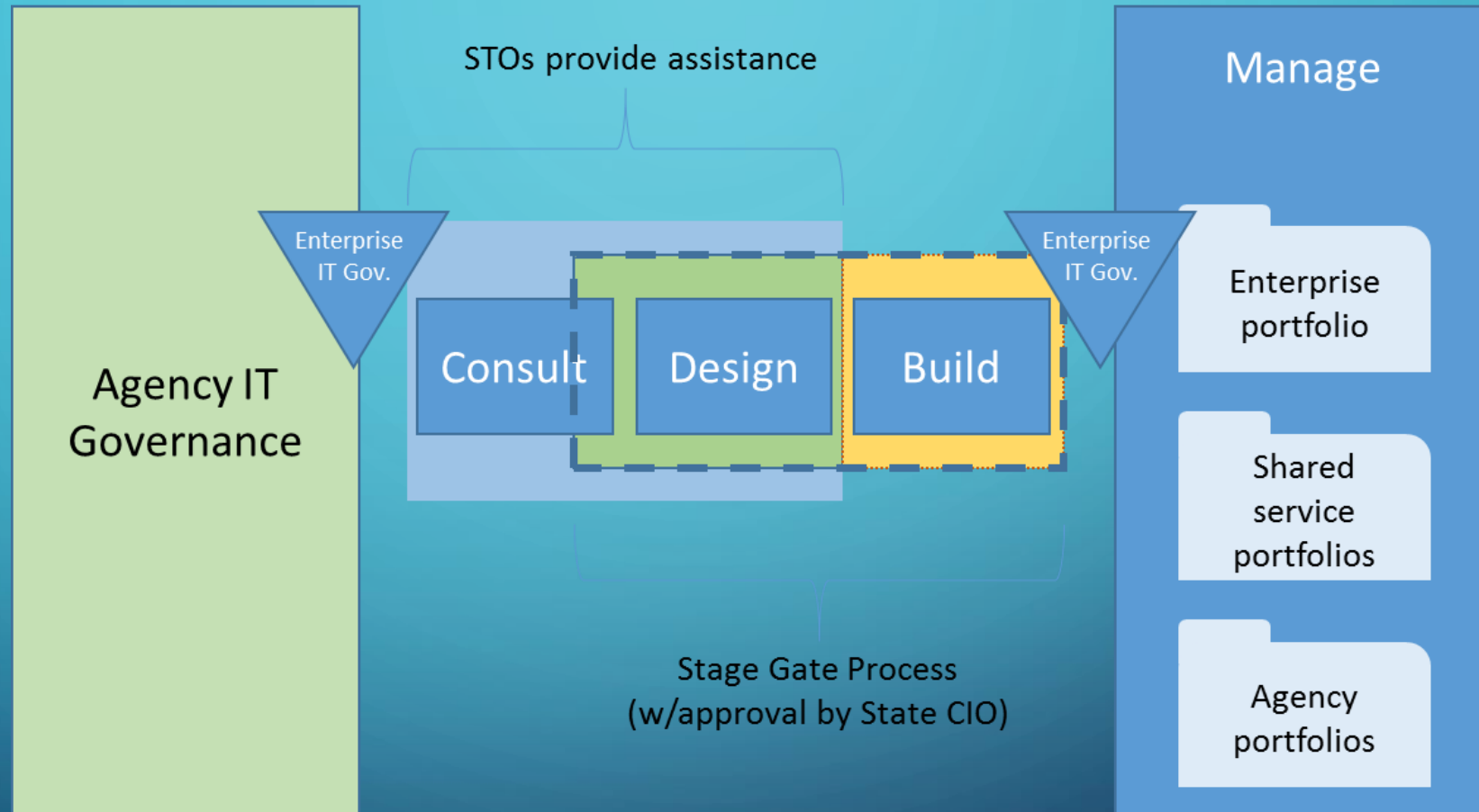
Utility Services

Strategic Technology Officers (STOs) Collaborate with:

Governor Policy Advisors
Programs Business Managers
Agencies CIOs
Other Partners

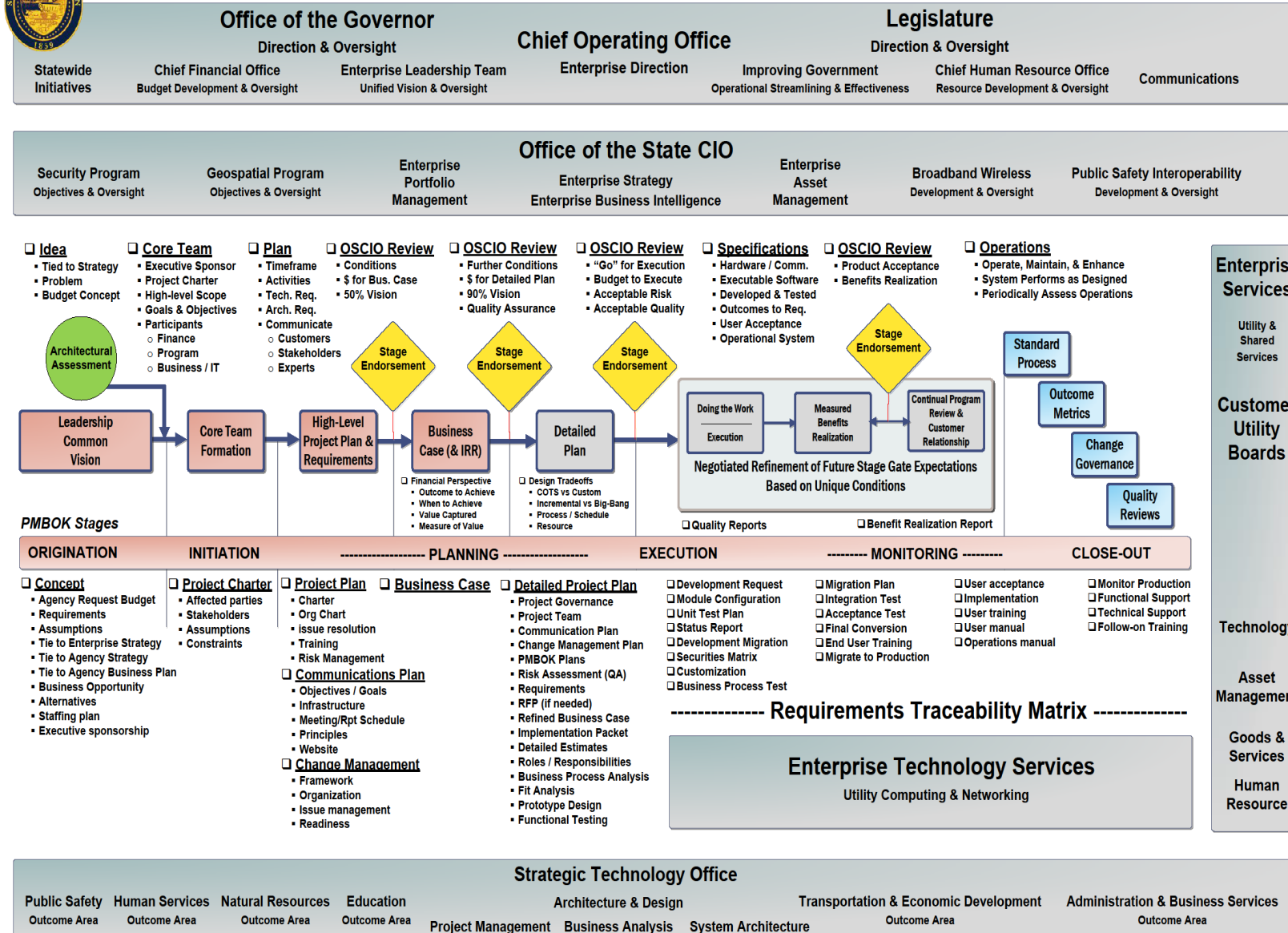
DAS Procurement
LFO
CFO

Governance in Action

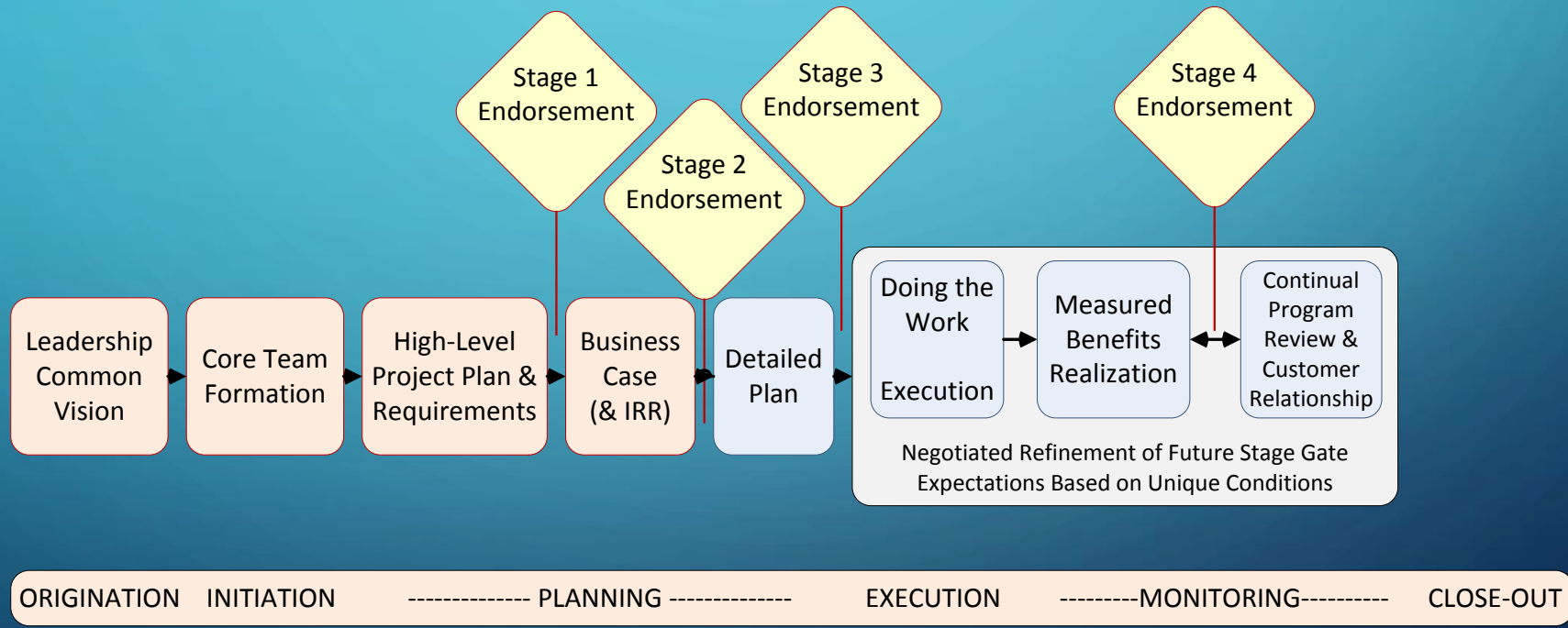




Stage Gate Oversight – Functional Reference Model



Stage Gates – High Level Overview



Organizational Change Leadership

September 27, 2015



Agenda

- Introductions
- Department of Revenue (DOR) Project Background
- Core Systems Replacement (CSR) Project Overview
- Organizational Change Leadership (OCL) on the CSR Project
- OCL Communication and Stakeholder Engagement Strategy
- OCL Benefits and Lessons Learned

Jennifer Hannan

CSR Project Manager

DOR Project Background

- Technology and Process Re-engineering Project (TaPR) - July 2009 through June 2013
 - Business process mapping
 - Rapid process improvement (RPI) - 4 people trained
 - Contracted experts for RPI, and Project Management Firm including OCL
- Core Systems Replacement Project (CSR) - July 2013 through December 2018
 - Commercial-off-the-Shelf (COTS) Solution
 - Fast Enterprises, LLC - GenTax

CSR Project Overview

The purpose of the CSR project is to replace a majority of the Revenue's core systems with the GenTax solution provided by Fast Enterprises, LLC (FAST). GenTax is a commercial-off-the-shelf integrated tax solution and data warehouse.

The CSR Project is...

“a catalyst for empowering our people, modernizing tools, improving processes, and supporting customers.”

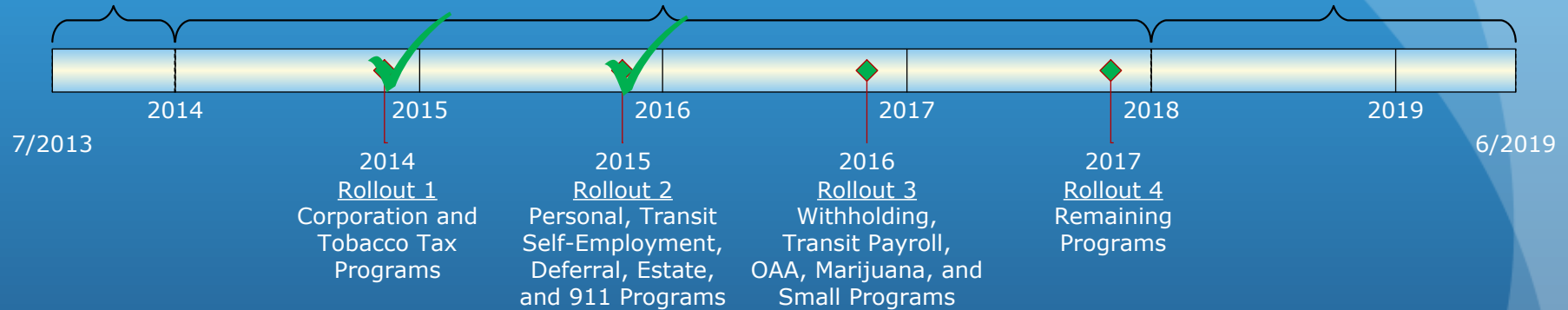
~ *CSR Executive Steering Committee*

CSR Project Roadmap

Jul 2013 - Dec 2013
Project Initiating
& Planning Phases

Jan 2014 - Dec 2017
Project Executing Phase

Jan 2018 - Jun 2019
Contract Maintenance &
Project Closing Phase



CSR Governance and Oversight

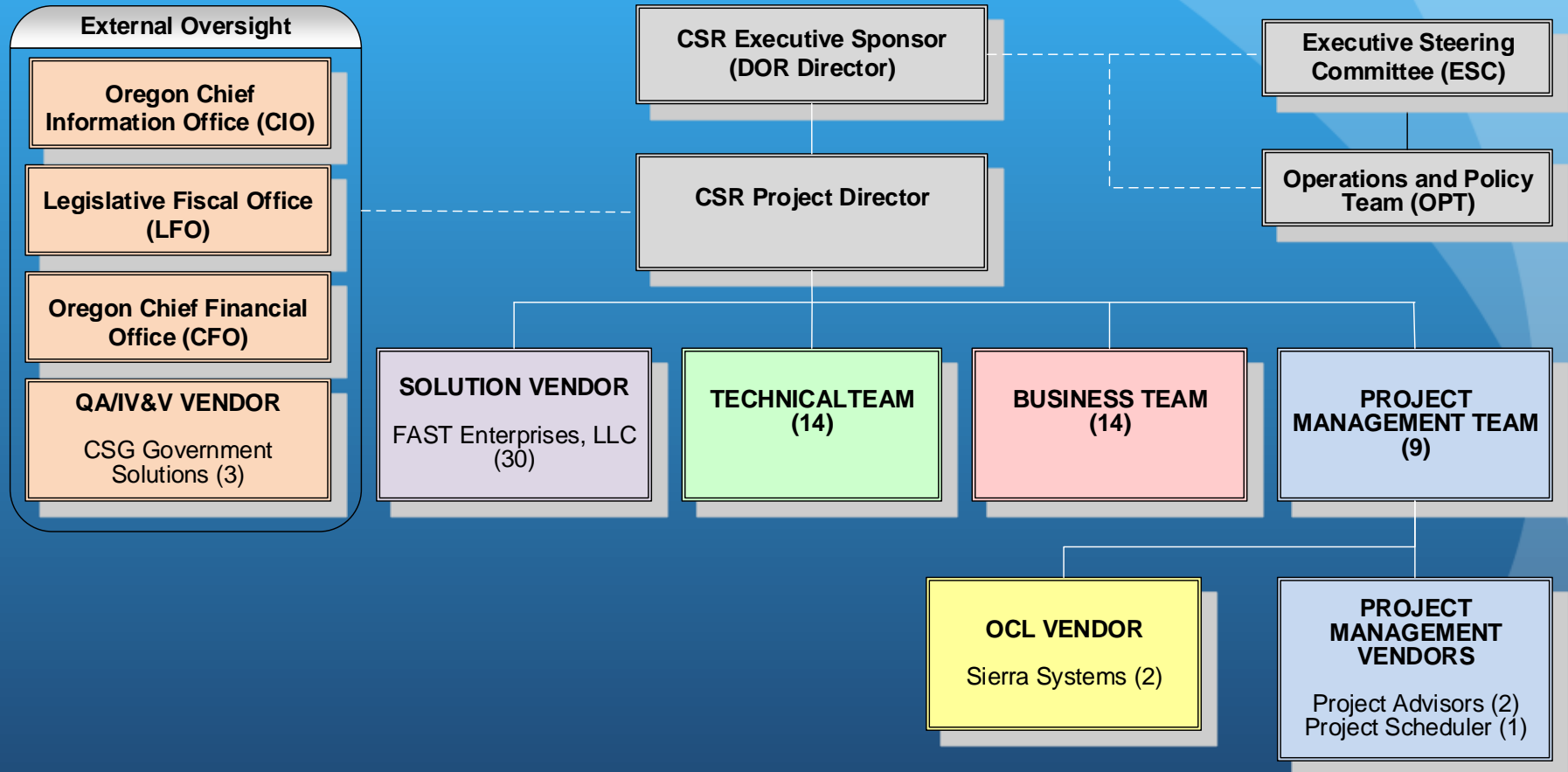
- Project governance
 - Executive Steering Committee
 - Operations and Policy Team (section-level leadership)
- Project oversight
 - Legislative Fiscal Office
 - State CIO's office
 - Independent QA (CSG Government Solutions)
 - Project team QA

CSR Foundational Strategies

- We are re-engineering our business processes to adapt to COTS solution
- Little or no customization
- Statutes and rules can and will be modified where necessary to accommodate best practices and improve effectiveness
- First-line managers are integral to prepare and lead employees through the change
- Required FAST to provide OCL leadership (deliverables based)
- Required OCL vendor (Sierra) to understand FAST's implementation methodology

CSR Organizational Chart

Core Systems Replacement Project



Mickaella Suarez

Organizational Change Leadership
(OCL) Coordinator



Please tell me in one word
what is “change”



Organizational Change Leadership (OCL)

- OCL for the CSR project
- OCL and Project Management
- OCL Strategy and OCL Plan
- Communication and Stakeholder Engagement Strategy
- OCL Benefits and Lessons learned

OCL for the CSR project

Why OCL on the CSR Project?

- Need for Change Leadership
 - Executive level support for project
 - Critical to show full support at top of organization
- Mid-level, first-line managers, staff buy-in & support

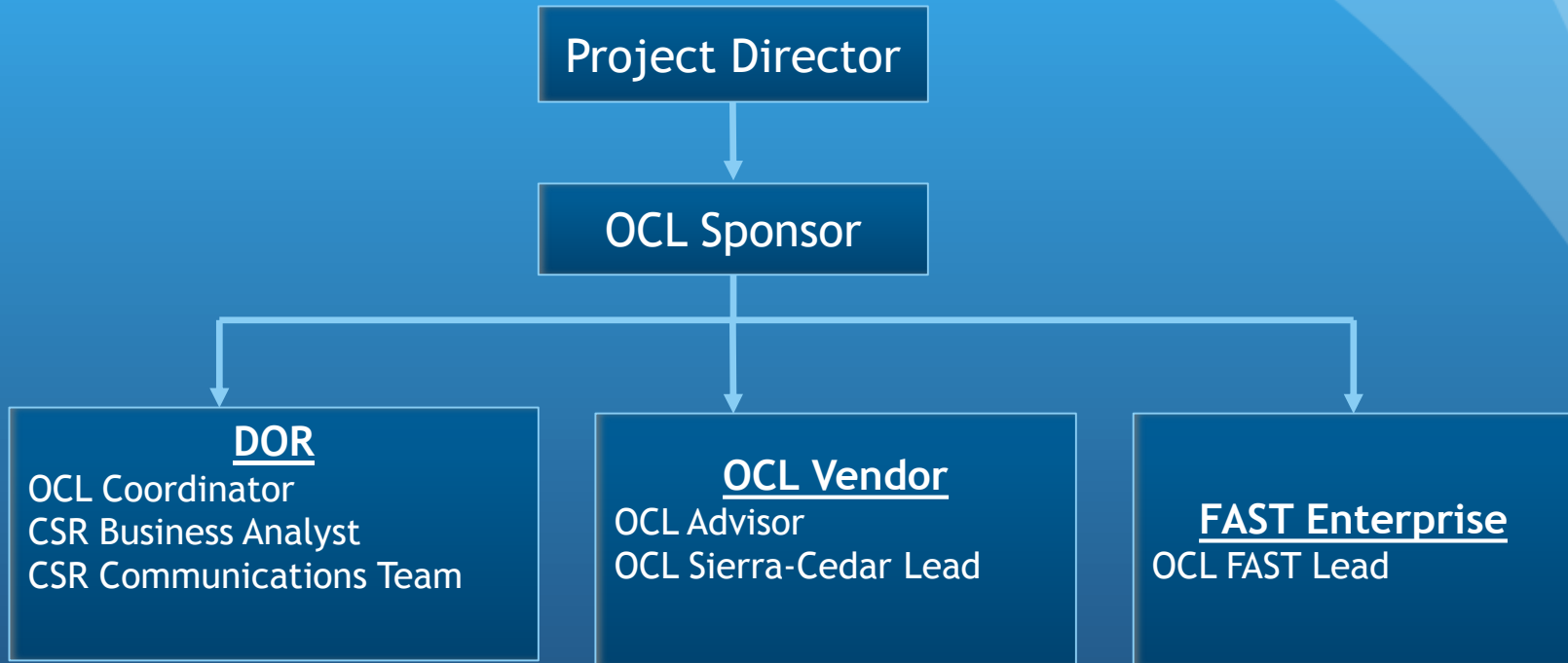
Why OCL on the CSR Project? Cont...

- Initiated OCL with expert vendor in **preparation phase**:
 - Prosci ADKAR model was engaged
 - **Awareness** of need for change
 - **Desire** to participate and support change
 - **Knowledge** on how to change
 - **Ability** to implement new skills/behaviors
 - **Reinforcement** for sustaining change
 - TaPR Lessons Learned

Why OCL on the CSR Project? Cont...

- Approach for **implementation phase**:
 - FAST provide initial strategy
 - Change leadership assessment
 - Identify areas impacted by business process improvements
 - Sierra-Cedar provide expertise to execute
 - Readiness assessments
 - Change transition planning
 - Coaching (executive level to first-line managers)
 - Communication strategies

OCL Team

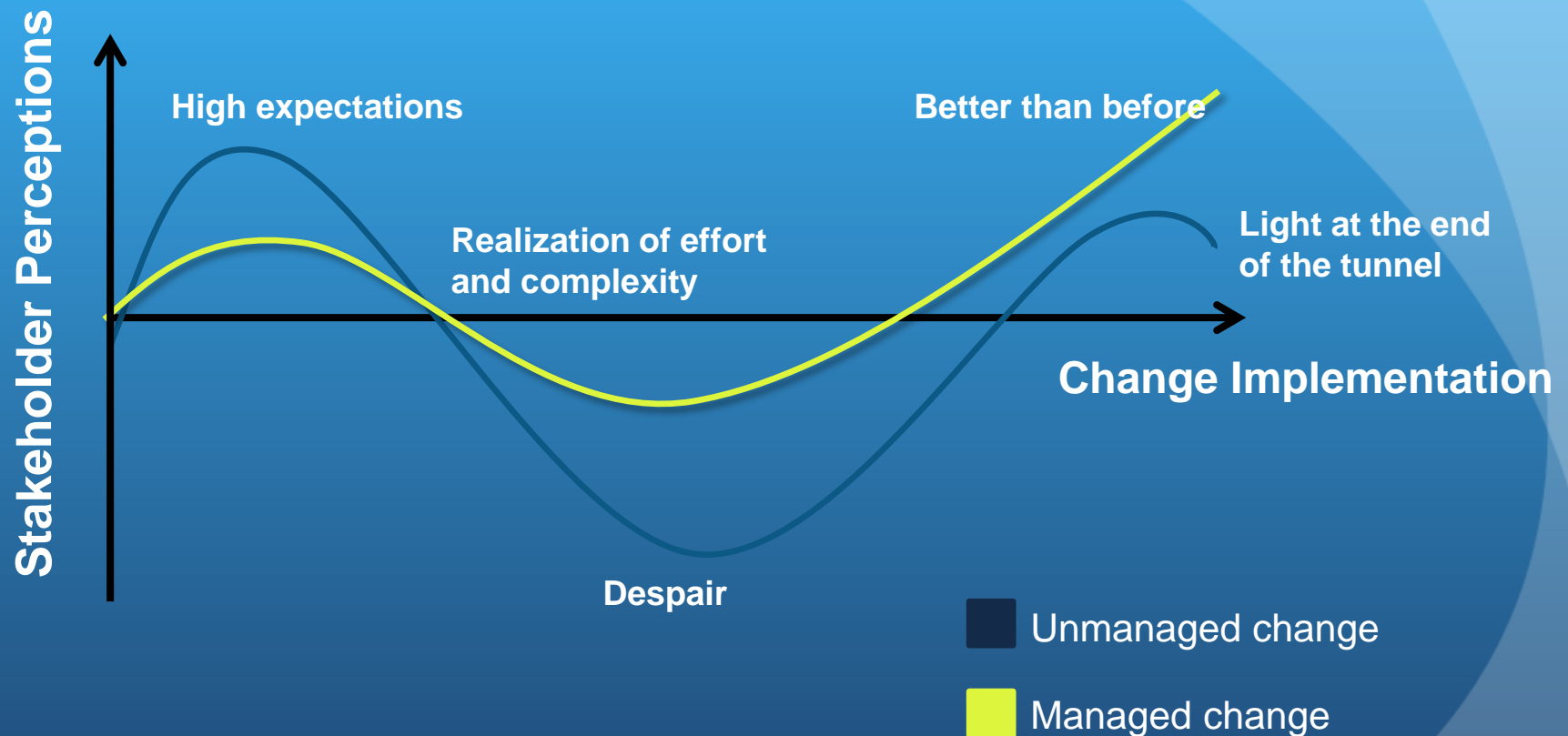


OCL and Project Management

What is OCL?

- To ensure that the *people* in the business units are appropriately prepared and ready for implementation of each phase of the CSR project
- Support *adoption* of new work processes, technology, and culture, etc.

The Value of OCL

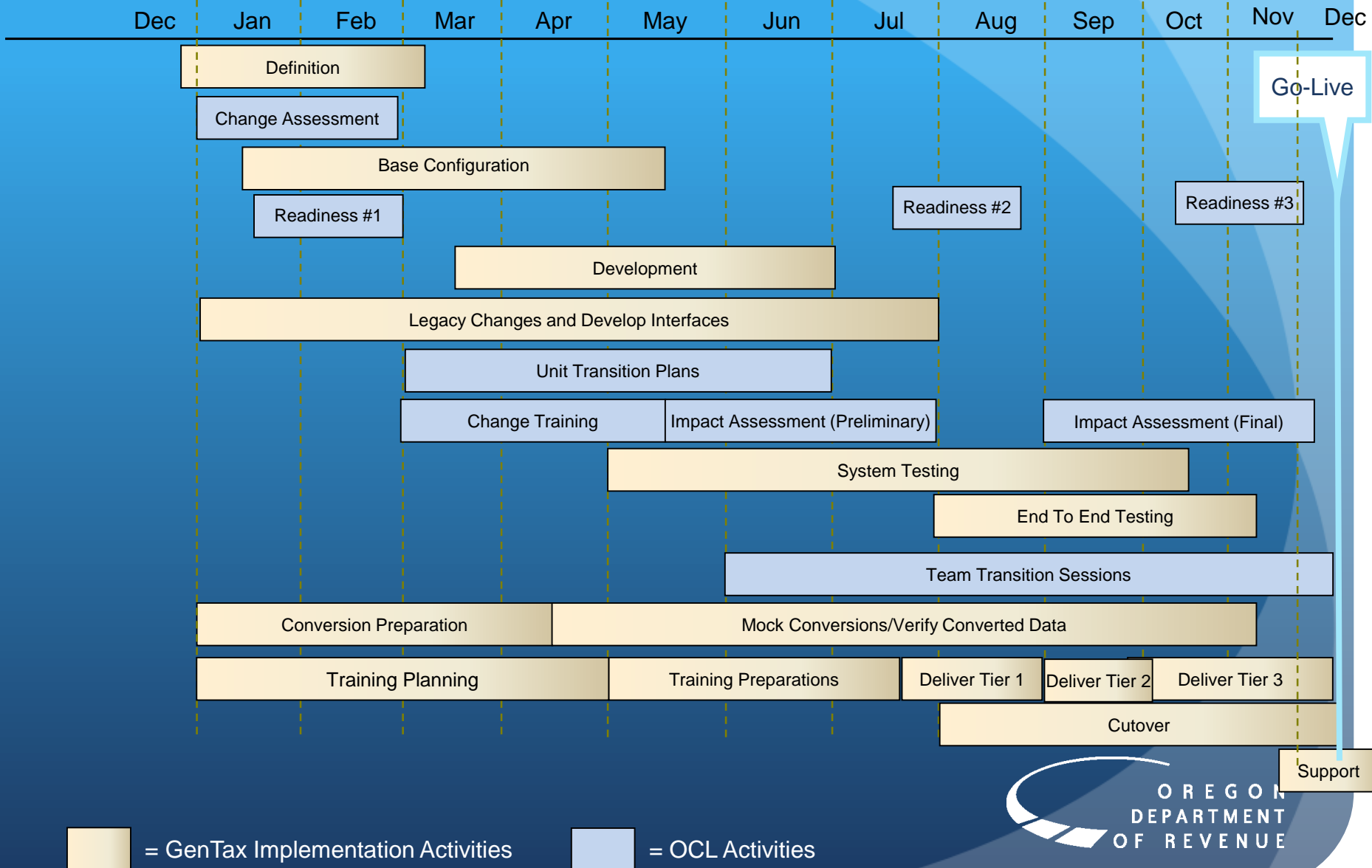


Project Change Triangle - 3 elements of successful change



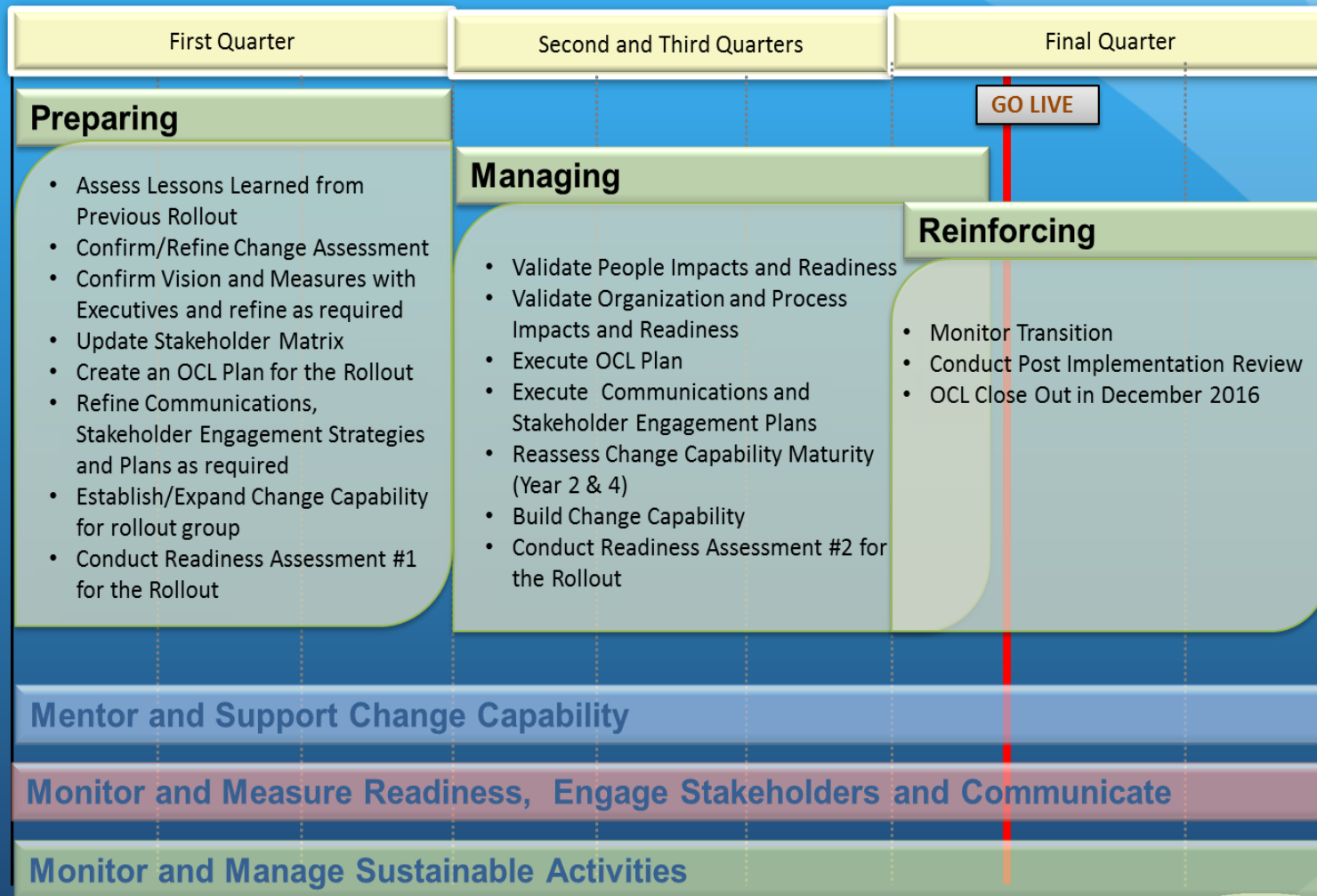
Source: PROSCI

Project Management and OCL Integration



OCL Strategy and OCL Plan

OCL Methodology on the CSR Project



OCL Methodology

- **Preparing for Change**
 - Develop OCL Strategy
 - Develop Communication and Stakeholder Engagement Strategy
 - Prepare OCL Plan and Outputs
 - Prepare Communication and Stakeholder Plan
 - Define OCL Team and Sponsorship

OCL Methodology Cont...

- **Managing Change**

- Execution of the OCL Plan
 - Readiness Assessments
 - Building change Capability (change network training)
 - 1:1 Coaching
 - Unit/Team Transition activities (customized sessions, resiliency training, etc.)
- Execution of the Communication Plan

OCL Methodology Cont...

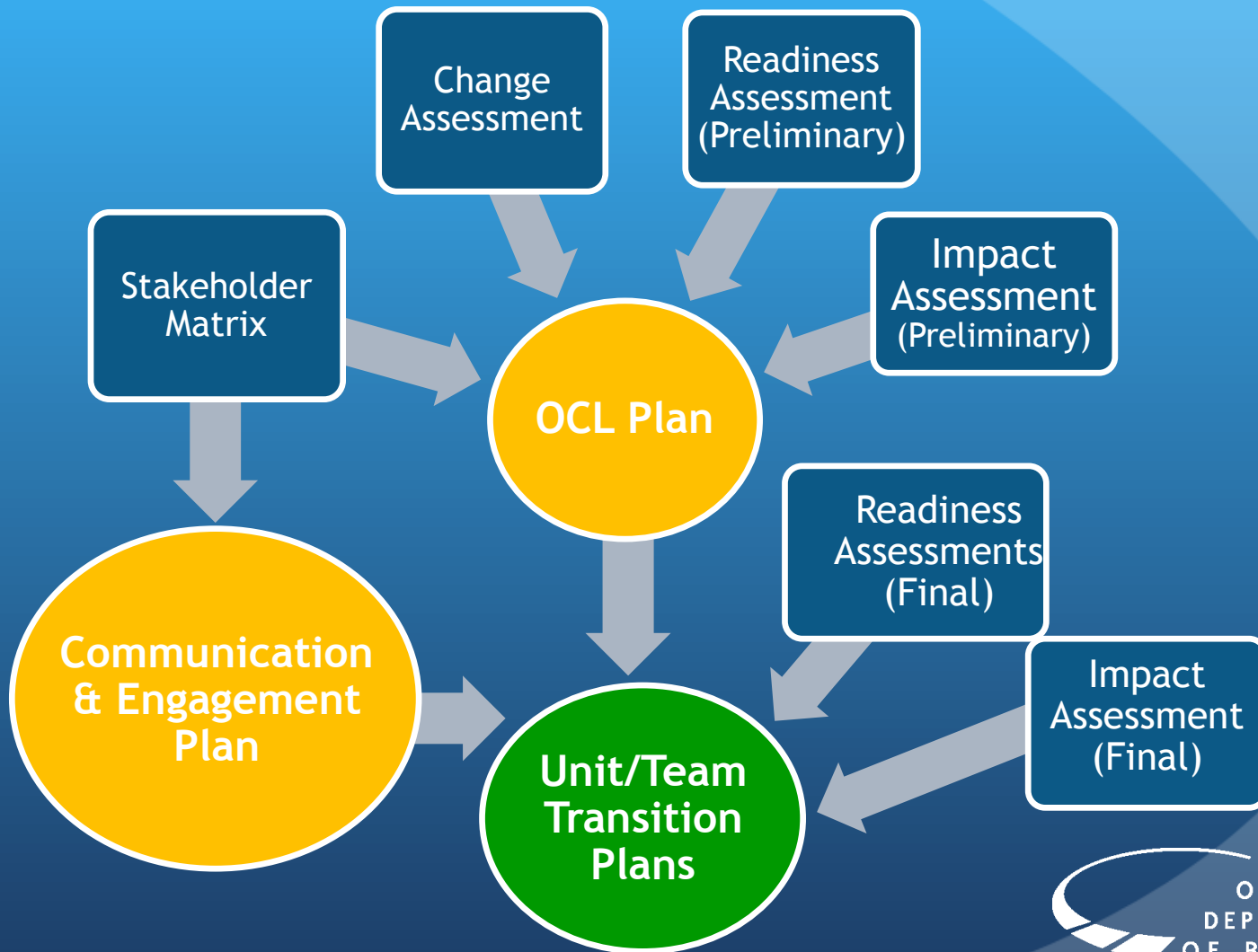
- **Reinforcing Change**

- Diagnosing gaps and managing resistance (Unit Team Transition sessions)
- Implementing corrective action and celebrating success

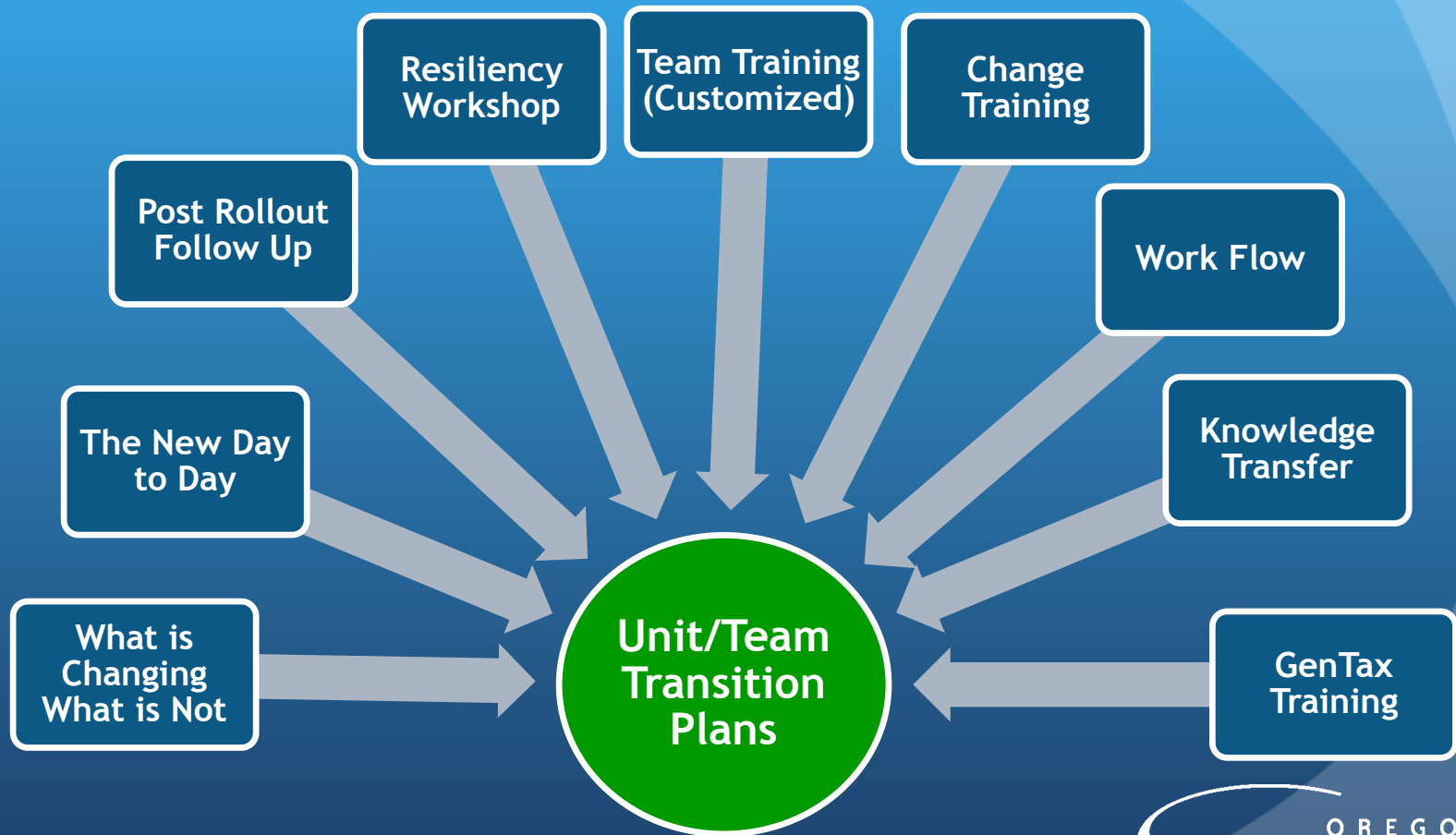
OCL Strategy

- Provides a framework and process to prepare, align, and garner commitment for adoption of new work practices for individuals and organization.
- Provides an overall method, philosophy, and guiding principles for managing change over the course of the project.
- Identifies who's the OCL Team & Extended team
- Identifies how change leadership capability will be developed throughout the project for long term sustainment.

Inputs Into the OCL Plan & Unit Transition Plan



Types of Transition Activities



Additional OCL Execution Activities

- Prioritization of OCL Resources (Sierra Cedar, FAST, and DOR staff)
- Unit/Team Sustainment & Reinforcement Activities
- Coaching Managers
- Change Capability (Network: Agents, sponsors, and champions)
- GenTax Version 10 - Additional training sessions for prior rollouts
- Field Offices, Visits - Demos, Training, etc.

Communication and Stakeholder Engagement Strategy

What comes to mind when you hear “project communication & engagement”



Communications and Stakeholder Engagement Strategy

- Provides strategy to ensure consistent, accurate, and timely information is shared with project stakeholders.
- Provides key communication guiding principles: Keep Stakeholder Informed, Ensure communication is Consistent, Tailor Communications, etc.
- This is one of the ADKAR activities to address concerns and influence acceptance

CSR Project Communication and Engagement Strategy



Vision Sessions:

Key Messages

- **Job Changes:** Anyone who wants a job will have one. They work may be different.
- **Performance Expectations while Learning GenTax:** The focus for staff as we transition to the new system is to learn the new work processes and system
- **Benefits of Standardization:** It will help us to optimize our business and break silos, allowing us to achieve our agency outcomes.

Key Challenges

- Effective using the existing governance and decision making process
- Balancing decision needed from the business in a short timeframe with the desire to engage all stakeholders
- Implementation Fatigue
- Comfort Using System and Process
- Greater Demand for Involvement

Revenue TV, Town Hall, Meetings, Project Updates

Communication & Stakeholder Engagement Plan

- CSR Communication Team: Project Manager, CSR PMO Manager, CSR Business Manager, Business Process Analyst, OCL Coordinator, External Communication coordinator and Agency Communication Representative.
- Hold monthly meetings to plan CSR upcoming 30-day communication plan (internal and external)
- Update Internal and external Communication Registry for executed and upcoming communications activities

OCL Benefits and Lessons Learned

Benefits of OCL in the CSR Project

- OCL created awareness of the change and how it affected the employees.
- Increased readiness level in the organization and the success of the project
- Helped managers to communicate decisions and changes to their staff early
- Provided key messages to staff impacted (job losses, performance, balance project and operations, etc.)

Benefits of OCL in the CSR Project Cont...

- Reduced Risk and inefficiency by identifying gaps (communication, training, desk-side support, etc.)
- Anticipated key Challenges and provided strategies and talking points to Managers
- Increased morale in the workplace & Employee Engagement
- Provided neutral environment to receive concerns, questions, and comments from impacted staff
- Helped to engage external stakeholders

OCL Lessons Learned

What went well

- The vision sessions with Executive Leadership helped to align the group
- The OCL approach and methodology was effective
- Team transition support was valuable.
- Creating partnership with the CSR Project Team, OCL, Human Resources and Program Administrators was effective.
- Communications overall went well- sharing key messages, cascading down messages, FLM meetings, CSR updates, etc.

OCL Lessons Learned Cont...

What we need to improve

- Time of the OCL execution - start early as possible
- Cascading key messages from Executive leadership to FLM and staff
- Role of DOR Managers in OCL activities
- Additional OCL support with Reinforcement and Sustainment activities for prior rollouts
- Timing of communication of decision to staff that have a large impact.
- Rollout 2 had impacts to Rollout 1 Units that were not communicated prior to go-live.

Questions?

Mickaella Suarez

OCL coordinator

Email: Mickaella.d.suarez@orgon.gov

Phone 503-871-5040

Thank you!

Partnering with the Department of Justice – Procurement Process

Department of Justice
General Counsel Division
Business Transactions Section
Fall 2016

Agenda

- I. Before the Solicitation Hits the Street
- II. The Solicitation
- II. After the Solicitation – Contract
Administration

I. Before the Solicitation Hits the Street

- Define the team – Attorney General
- Advice (ORS 279A.161)
- Development of the solicitation
- Use of templates (ORS 279A.157)

Define the Team

- Agency Personnel, users
- Agency Procurement
- Agency Risk Management
- DAS Procurement Services
- DAS Risk Management
- If its IT, OSCIO
- Consultants
- Attorney General

Define the Team – Attorney General

- Attorney General's authority and responsibilities
- Attorney-Client relationship
- Attorney-Client privilege

Define the Team – Attorney General

- Attorney General's authority and responsibilities (ORS 180.060, 190.430, 291.047, 291.049)
- *"No state officer, board, commission, or the head of a department of institution shall employ or be represented by any other counsel or attorney at law."*
ORS 180.220(2)
- Attorney-Client relationship
 - The Client is the State of Oregon.**
- Attorney-Client privilege

Attorney – Client Relationship

- **Involve the attorney early**
- Know the deal: determine Agency's needs, goals and get all relevant agency persons involved.
- Outline a plan of action
- Prepare documents; proof read documents
- Procurement and contracting is not a linear process

Attorney – Client Privilege

- Privilege extends to the State
 - *Consultants are not within the Privilege*
- AAGs may deal with many agencies and even deal with potential legal disputes between agencies.
- ORS 279A.161 Advice and what to do with it

The Cost of Legal Services

- Attorneys track time for billing purposes.
The number of hours is based on:
 - ✓ Complexity of the matter
 - ✓ Novel legal issues
 - ✓ Quality of the documents; and
 - ✓ Number of conversations needed to establish missing business concepts
- Hourly rate set by the Legislature (\$175)

Confidential Information

- Other Confidential Information – Oregon is transparent State
- Protect the process and open, fair competition
- Prior to Issuance of Notice of Intent to Award, solicitation submissions are confidential
- Trade Secrets (ORS 192.410 – 192.505)

Development of the solicitation

- Agency's statutory authority
- Needs/Wants
- Market research - use of RFI
- Cost analysis/feasibility study (ORS 279B.033, 279B.036)
- Assistance with development of specifications (ORS 279B.040) – Be careful!

Development of the solicitation

- Statutory mandates: federal and state
- Grant requirements
- Follow statutes and rules
- Follow policies (i.e. for information technology initiatives - must consult with OSCIO follow Stage Gate and independent quality management policies)

II. Solicitation

- Sourcing Methods
- Development of the Solicitation (Part Two)
- Process
- Attorney's Role
 - Authorize Release
 - Authorize Addenda
 - Contract Negotiation and Approval

Sourcing Methods

- Competitive Bid (ORS 279B.055)
- Competitive Proposal (ORS 279B.060)
- Small Procurement (ORS 279B.065)
- Intermediate Procurement (ORS 279B.070)
- Sole Source (ORS 279B.075)
- Emergency Procurement (ORS 279B.080)
- Special Procurement (ORS 279B.085)

Other considerations

- Surplus
- Qualified Rehabilitation Facilities
- Oregon Corrections Enterprises
- Cooperatives (NASPO)
- GSA, Schedule 70, 84
- IGA
- IAAs

Development of the solicitation

- Use approved templates (ORS 279A.157)
- **Use the correct templates**
- Redline any changes
- Include all necessary documents or links
- Solicitation must be clear! Things to avoid:
 - Ambiguity – write clearly.
 - Use terms consistently, in all documents related to transaction.
 - First or second person

Development of the solicitation

- Requirements must be clear!
 - Evaluation and Scoring must be clear!
 - Multiple awards, include selection process
 - Funding
-
- Obtain all necessary approvals prior to release!

Solicitation Process - RFP

- Release**
- Single Point of Contact – Protect the Process
- Pre-Proposal Conference
- Addenda**
- Closing
- Multi-step, Competitive Range
- Evaluation and Scoring
- Responsibility determination (ORS 279B.110)
- Contract negotiation**

Release

- Attorney General reviews the Solicitation Documents, including addenda:
 - Review the anticipated public contract
 - Read all the documents
 - Highlight important issues and make recommendations or propose revisions
- Solicitation should include requirements and sample contract
- Attorney General authorizes release of solicitation

OAR 137-045-0035

Contract Negotiation

- Attorney General part of the negotiating team
- Participates in preparation and negotiation sessions
- Attorney General reviews and approves the final Contract - **Legal Sufficiency**

OAR 137-045-0030

Legal Sufficiency Approval Requirements – For State Agencies

All Public Contracts of State Agencies over \$150,000 (*unless otherwise exempt*) must be approved by the Attorney General before services are performed or payment is made.

- ORS 291.047 and
- OAR 137-045-0010 to OAR 137-045-0090.

Legal Sufficiency Means. . .

- The contract is in written form
- Agency has statutory authority for the subject matter
- Elements of a contract exist
- Contracting document complies with statutes and rules and contains required provisions
- Required certifications are included
- Document does not violate constitutional limitations
- Statement of work and business terms are clear enough to be enforceable
- Contract allows agency to terminate, declare defaults and pursue rights and remedies when appropriate

See OAR 137-045-0015 (4)

Legal Sufficiency Approval Does Not Mean. . .

- Facts and circumstances not apparent on the contract face were considered
- Person signing for agency is authorized to sign
- Technical provisions or specifications reflect agency intentions
- Contract is a good business deal
- Contract complies with grant conditions or federal funding requirements
- Particular remedies are available
- Contract is free of grammar, spelling, style, punctuation errors
- Remedies are available when contract is with another sovereign

See OAR 137-045-0015 (5)

What does review require?

- Reviews entire contract including exhibits, referenced documents, (i.e websites) and prior amendments – looking for the elements
- Highlights important issues and make recommendations or proposes revisions.
- AG ***approves*** price agreements or master contracts
- AG ***approves*** Public Contracts ***for legal sufficiency***
- Approval may be on face of document or attached email

Legal Review May Also Include...

- Identification and assessment of risks and methods of eliminating or mitigating those risks
- Developing options or contract alternatives to solve problems
- Giving practical advice to avoid costly mistakes
- Recommending alternative contracting methods, rules and remedial legislation when necessary
- Assisting with exemptions, ratifications and waivers

Public Contracting Tips

- Contracts may be oral or written; written preferable:
 - Evidence of a meeting of the minds (parties agreeing to the same subject matter, same consideration, same terms)
 - No “he said/she said”
 - For state agencies, required to be in writing by statute: ORS 291.047

Tips - Elements of a Contract:

- Parties – for State Agencies: *the State of Oregon, acting by and through _____*
- Parties – for Contractor: full **legal** name
- Subject matter: goods, services, both
- Offer and acceptance
- Promise or the “Meeting of the Minds” or mutuality of purpose
- Consideration – DO THE MATH!

III. After the Solicitation

- Advice (ORS 279A.161)
- Transition from Project to Production
- Contract Administration
- End of the Contract
- Ratification
- Waiver

After the Solicitation

- Advice (ORS 279A.161)
- Transition from Project to Production
 - Kickoff meeting (one with contractor – one without contractor)
 - Define team, define roles
 - Set expectations
 - **Understand the contract! Hopefully, the contract is clear!**

If not, Contract Interpretation:

- Interpretation by a court may be necessary
- Rule of Four Corners
- Parole Evidence
- Incorporation of other documents, web sites
- Order of Precedence – only applies if terms conflict
- When in doubt, ask!

After the Solicitation – Contract Administration, Contract Management

- Agency responsibilities
- Acceptance of goods, services, deliverables – in timely fashion
- Amendments/Change Orders**
- Escalation**
- Breach, Notice to Cure, use appropriately**
- Termination**
- Transition**

The End (*of the Contract*)

- End of a contract may be a legal issue.
- By its terms – purpose fulfilled. YAY!
- Upon notice, review terms and conditions.
- Automatic extension – watch it!
- Early – choice or breach
- Migration/Transition
- When in doubt, ask.

What Happens if . . . Legal Sufficiency Approval was Not Obtained?

- Contract is not binding on the State
- No payment may be made to the Contractor for services or goods provided under the contract
- No services may be performed

What Happens if . . . Legal Sufficiency Approval was Not Obtained?

Originally exempt,

- Amendment or change renders subject to legal sufficiency review
- Submit contract, all attachments, exhibits and new amendment for review
- Attorney General reviews (see above)

What Happens if . . . Legal Sufficiency Approval was Not Obtained?

Originally **not** exempt, agency may ratify!

Ratification Process: agency must submit:

- A ratification document (unsigned) along with the contract and all amendments for legal sufficiency review.
- The ratification document must contain:
 - An explanation of why the contract was not submitted for legal sufficiency
 - Description of the steps being taken to prevent reoccurrence

OAR 137-045-0090

Waiver

- **Waiver:** A State Agency also may request waiver of the requirement for review of Solicitation Documents prior to release, in the event the Agency did not obtain.

OAR 137-045-0035(1)

Questions?

Answers!

Call 503-947-4540



ENTERPRISE TECHNOLOGY SERVICES

Presented by Wayne Smith

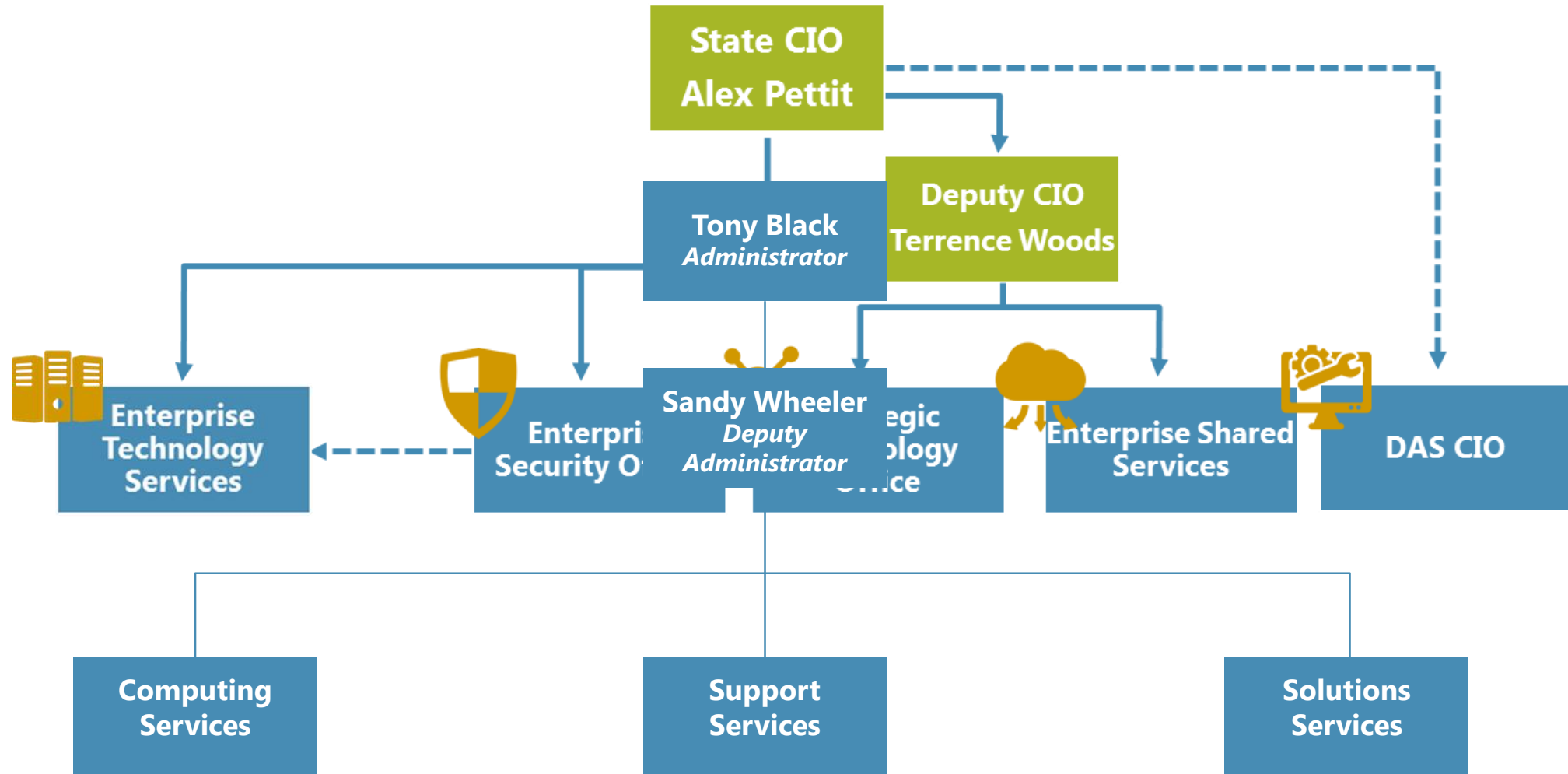
WHO WE ARE AND WHAT WE DO

Mission: *To provide reliable, agile, and flexible IT service choices while optimizing the state's IT investments.*

Vision: *The infrastructure and data center services provider of choice and is the organization where people want to work.*

- Tier 3 datacenter
- IT staff augmentation
- Brokered Services
- Provide shared services for government entities
- Close partner with the Enterprise Security Office
- Division of the State CIO's office

OSCIO ORGANIZATION





SERVICE OFFERINGS

- Server Hosting
- Network Services
- Backup Services
- Mainframe Services
- Compute Storage
- Enterprise Email
- Security
- Midrange Services

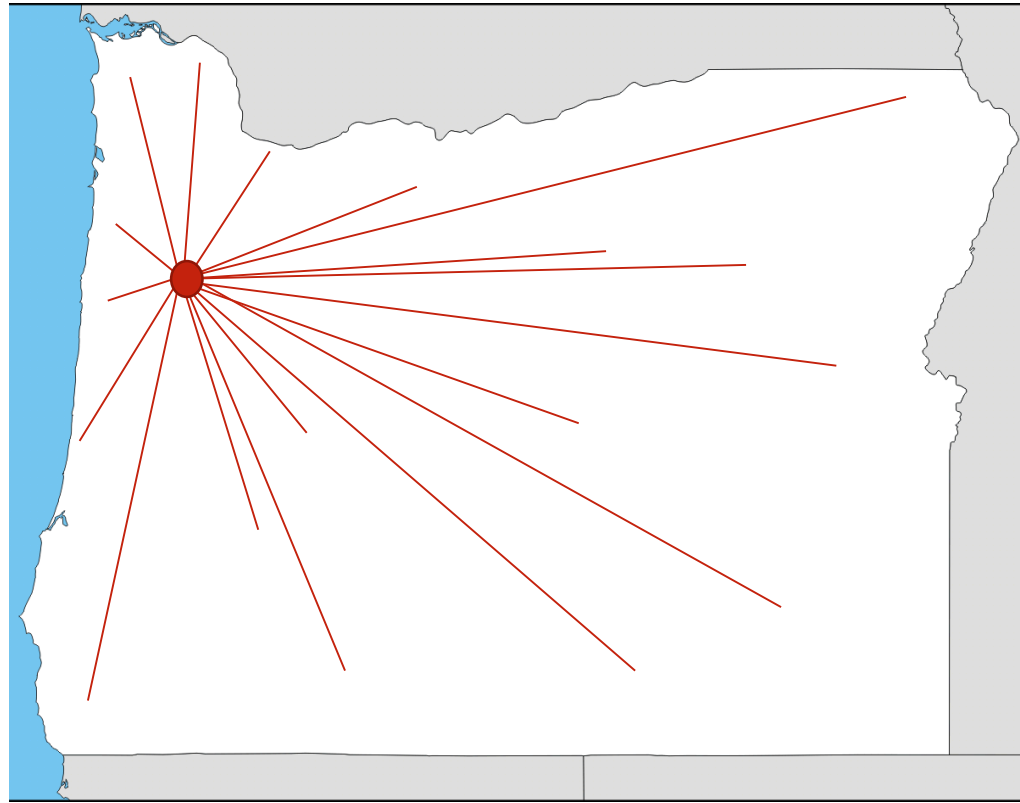
SERVER HOSTING

- Hitachi UCP System
- Windows & Linux Support
- Design, build and support customized solutions
- Primarily virtual environment



NETWORK SERVICES

- WAN services to all areas of the state
- LAN services
- Wi-Fi services for both LAN and WAN networks



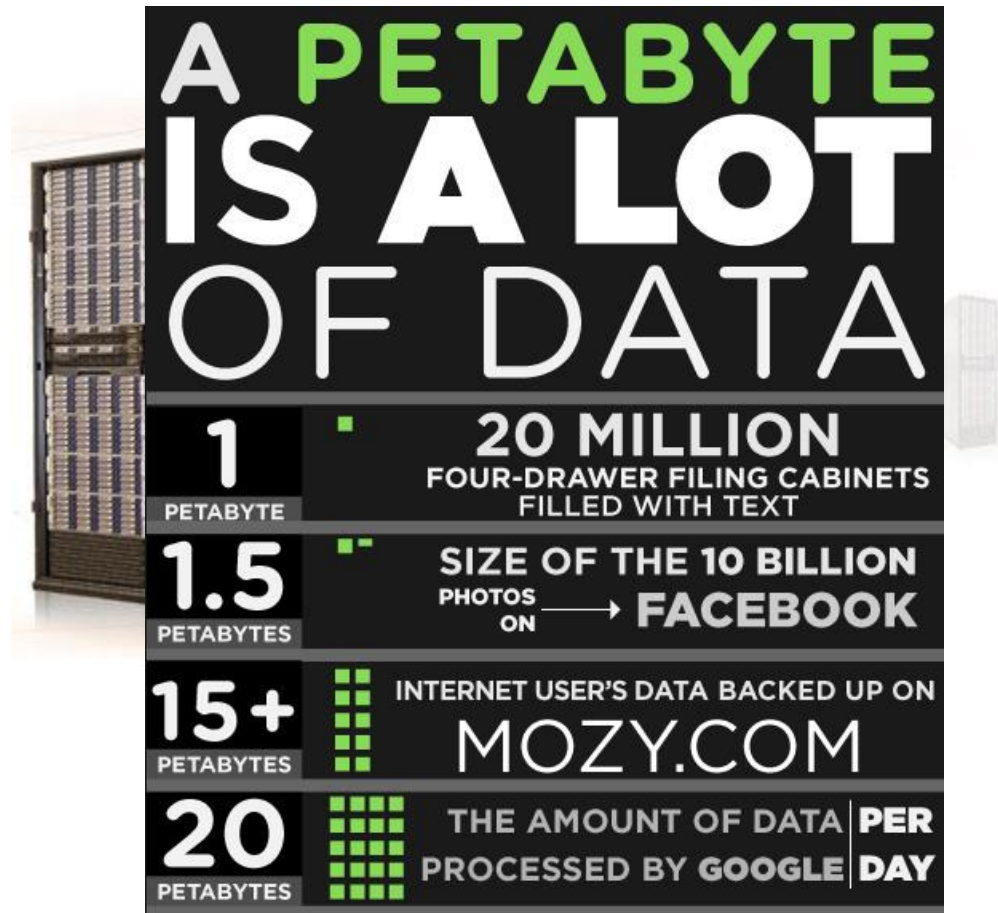
BACKUP SERVICES

- Offsite storage for Disaster Recovery
- 10Gb connection to Montana datacenter
- 2015 NASCIO award



COMPUTE STORAGE

- Manage 12 petabytes of storage
- Hitachi UCP, Mainframe and backup services utilize storage



ENTERPRISE EMAIL

- Exchange environment
- Each customer manages their own user base
- Archive included



SECURITY

- F5 Firewall infrastructure
- VPN services
- Centralized security model



SIGNING UP FOR SERVICES

- Send us an email:
SDC_Info_Dist@Oregon.gov
- Call us at [503-378-6758](tel:503-378-6758)
- Submit a ticket:
<http://www.oregonsdc.org>

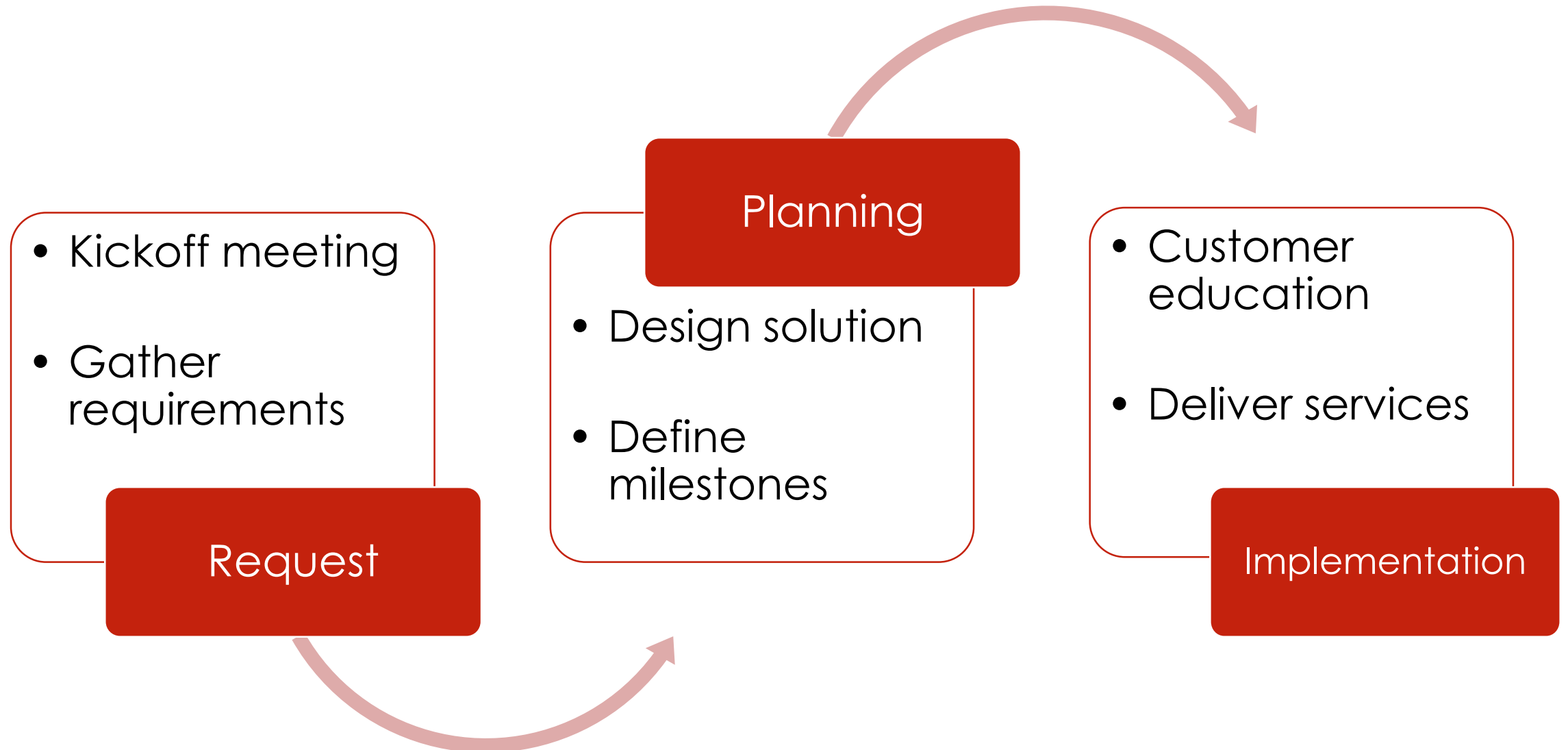


PLANNING THE TRIP TO ETS

- Key items for planning transitions
- Getting the right people involved with transitioning services
- Budget preparation



WHAT TO EXPECT





We're here to help!

For more information, contact us:

503-378-6758 or
SDC_Info_Dist@Oregon.gov



DMV's Service Transformation Program

Branding Your Business Case

Oregon Project Management Summit: Taking It to the Next Level

Ben Kahn, DMV Transformation Manager
Oregon Department of Transportation
September 27, 2016





This is a high-level overview of the presentation. The complete slide deck will be made available after the summit.



- Preparing and Building
- Sharing
- Selling
- Panel Discussion

Panel Discussion

Ben Kahn



DMV
Transformation
Manager

Craig Austin



DMV STP Lead
Transformation
Business Analyst

Lisa Martinez



DMV STP Change &
Communications
Manager

Tom Fuller



ODOT
Communications
Section Manager

More questions?

Ben Kahn

Transformation Manager

Benjamin.S.Kahn@odot.state.or.us

503-945-5353



Craig Austin

Preparing and Building Your Business Case

Table Discussion

IDENTIFY

1. Available Resources
2. Unexpected Gifts
3. Making the Complex Easy



Lisa Martinez

Sharing Your Business Case

Table Discussion

IDENTIFY

1. Stakeholders
2. What's In It for "Me"
3. Call to Action



Tom Fuller

Selling Your Business Case

ODOT Team

Panel Discussion

Procurement Services

Presents

How to engage with DAS PS



- ▶ Bring us in early on in your project.
- ▶ Submit the request for an analyst either through ORPIN as a PR (Purchase Request) or for DAS divisions and client Boards and Commissions, manually through a CSR (Contract Services Request) to this email:
DAS.PS.ContractServices@oregon.gov
- ▶ If your Agency has procurement personnel, they will be a part of the team.

Stage Gate Process:

There are four (4) Stage Endorsements, they are:

- ▶ Stage Gate 1: is performed during the budgeting process and corresponds to a project's Concept/Origination Phase.
- ▶ Stage Gate 2: is performed during preparation of a detailed Business Case / IRR and corresponds to a project's Initiation Phase.
- ▶ Stage Gate 3: is performed during preparation of a project's Detailed Plan and corresponds to a project's Planning Phase.
- ▶ Stage Gate 4: covers the main implementation work of a project and corresponds to the project's Execution Phase and Project Close-out.

RFP Kickoff Meeting

Attendees

- ▶ Agency (including Agency purchasing personnel)
- ▶ DOJ
- ▶ STO and Analyst
- ▶ Other?

Agenda

- ▶ Introductions - All
- ▶ Project Overview - Agency
- ▶ DOJ - Contract Vehicle and potential issues
- ▶ STO/Analyst - Stage Gate overview including timeframes
- ▶ Roles & Responsibilities Moving Forward - Procurement Analyst
- ▶ Next Steps - Procurement Analyst

Timeline

See attached document

Develop RFP Using the IT RFP Template

The workgroup will work together to develop the RFP. This includes the following Sections of the RFP:

1. Introduction
2. Schedule of Events
3. Project Specific Definitions
4. Minimum Requirements

5. Proposal Content Requirements:

- Scope of Work and Project Implementation Plan
- Project Schedule
- Migration Timeline
- Testing and Acceptance
- Communications Plan
- Escalation Plan
- Disaster Recovery and Business Continuity Plan
- Staffing

6. Solution Requirements:

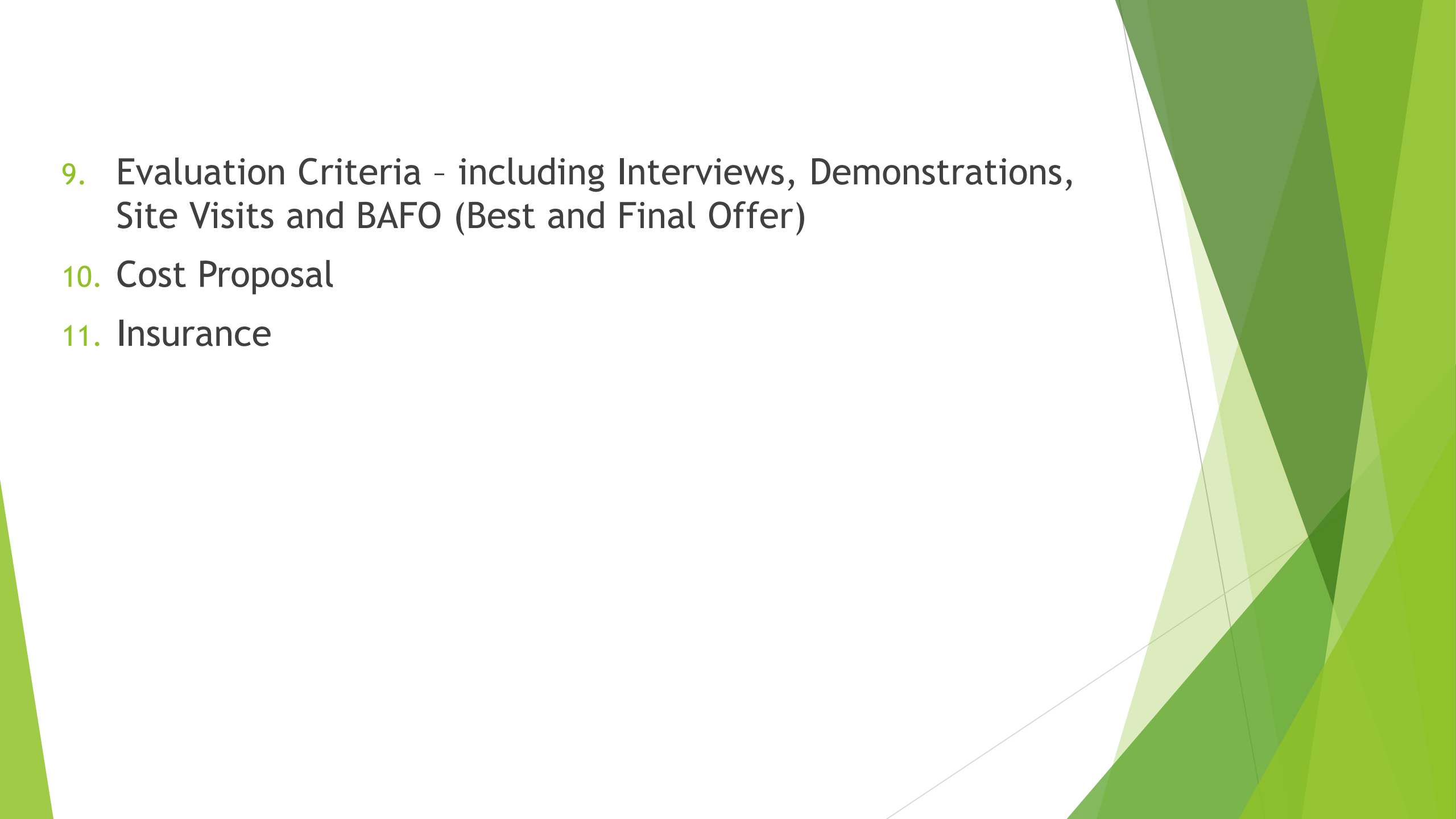
- System Requirements
- Network Capability
- Network Security
- Security Monitoring and Management
- Scalability
- Equipment and Equipment Replacement
- Private Network Cloud
- Database Accuracy, Maintenance and Availability

7. Services:

- Project Management
- Data Gathering
- Network Design
- Data Migration
- Acceptance Testing
- Pilot
- Implementation Plan
- Training

8. Ongoing Services; Maintenance and Repair; Customer Services/Help Desk:

- Post-Cutover Support
- Network Services and Management
- Network Performance, Fault Monitoring
- Network Configuration and Change Management
- Help Desk/Customer Service
- Maintenance and Repair
- Reports
- Billing
- Performance Standards and Service Level Agreements (SLA's)

- 
- The background of the slide features abstract, overlapping green geometric shapes, primarily triangles and polygons, in various shades of green, creating a modern and dynamic visual effect.
- 9. Evaluation Criteria - including Interviews, Demonstrations, Site Visits and BAFO (Best and Final Offer)
 - 10. Cost Proposal
 - 11. Insurance

Evaluation and Contract Negotiations

1. Once the RFP closes, an evaluation group will evaluate the responses received. As an example:
 - Round 1 = Proposal Response
 - Round 2 = Interview/Demonstration/Presentation
 - Round 3 = Site Visits
 - Round 4 = BAFO
2. Once the Intent to Award is issued, the negotiation team (including DAS PS, DOJ, SME's, PM at a minimum) negotiates the contract with the proposer.
3. Before the contract can be signed, it must have:
 - DOJ Legal Sufficiency approval (> \$150,000)
 - Feasibility Determination for IT Services >\$250,000
 - HB2375 forms completed and signed
 - If a Stage Gate project, Stage Gate 3 endorsement
 - Pay equity Compliance Certificate
4. After the contract is signed, DASPS schedules a contract administration kick off meeting with Agency to discuss roles and contract administration duties.

Below is an update on current Statewide Price Agreements and Future Projects Occurring at DAS PS

Item	Update	Additional
Cell Phones	Sourcing team will start creating the new solicitation later this year. This is transitioning over to the IT Team, John Anglemier	Determining categories, i.e., cell phones/devices, service plans, tablets and other devices, broadband and internet.
Managed Print Services	NASPO awarded Master Agreements with Konica Minolta, Lexmark, Pacific Office Automation and Ricoh.	DAS PS determined there is insufficient interest in managed print services at this time – no contracts will be sought.
Software	Worked through NASPO on new software solicitation which resulted in one Master Agreement with SHI.	Current Price Agreement #2590 will continue to be extended until the new SHI Master Agreement is in place.
Audio/Video	Carahsoft Price Agreement #5751 is in place. There is a Buyer's Guide attached to the ORPIN document.	
MSP	The current Price Agreement has a maximum term of January 6, 2019.	Re-solicitation has not begun yet. Research is ongoing.
Copier Update	We have Price Agreements with Ricoh, Xerox, Canon, Sharp and Konica Minolta.	NASPO has decided there will be no HP contract.

Hardware	<p>Price Agreement #5603 is in place with CDWG. The link to the Buyer's Guide: http://www.oregon.gov/das/Procurement/Guiddoc/BuyersGuide5603.pdf</p> <p>The link to Exhibit A which includes categories, manufactures, pricing methodology, contract management systems and restrictions can be found on the ORPIN page.</p>	
CSP (Communications Special Procurement)	DAS PS is currently negotiating 5 new Price Agreements.	DAS PS has added the category of long distance services to CSP. We are currently working on amendments with current Price Agreement holders as well as the 5 new Price Agreements to include long distance.
QA Price Agreements	<p>The 10 current Price Agreements will be amended to June 30, 2017.</p> <p>A Special Procurement was posted to notify the Public that included in the new RFP will be a process to add new vendors as needed.</p> <p>The RFP was released September 14, 2016 and will close October 31, 2016. There is a pre-proposal telephone conference on Wednesday, September 28, 2016.</p>	<p>Ultimate goal is to establish master agreements with several consultants to enable Agencies and ORCCP to obtain QA services and other project support services (i.e. Project Management, Business Analysis, System Analysis, etc.).</p>

Travel	Travel Price Agreement is through Corporate Travel Management (CTM), #2579.	
NicUSA	Currently in the process of restating the current Price Agreement. There will be DOJ approved templates, a “Buyers Guide” and the Price Agreement will be opened up to ORCPP.	
ODOT TAMS	Time and Attendance system with Kronos. ODOT is participating in the Pilot project (estimate 12 months), once complete this Price Agreement will be opened up statewide.	
HRIS	The Statewide RFP will be released this week. It will allow for the replacement of PPDB, PICS, Meridian (optional) and NEOGOV (optional). The resultant contract will provide the flexibility to deploy additional enterprise systems at the sole discretion of the State based on need, return on investment and funding. Subsequent system modernization efforts may include modules such as Payroll, Time and Attendance, Procurement, Financial, Accounting and Budgeting.	
IT Professional Services	Currently working with DHS, ODOT and ETS on a statewide RFP for IT Services at a higher level than what is offered on Covendis. Estimated timeline for Price Agreements to be in place is 12/31/16.	
Cloud Services	Participating through NASPO on the Cloud Services procurement – evaluations will be completed by end of July. Master Agreements will be awarded in August. DAS PS will work with OSCIO to evaluate and award Oregon Price Agreements from the Master Agreements list.	

Finding Price Agreements:

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- ▶ Statewide Contract Search
- ▶ By Keyword

Call the ORPIN Help Desk:

- ▶ (503) 373-1774

IT Procurement Team:

IT Manager:

► Ginny Beckwith (503) 378-4639 Ginny.Beckwith@oregon.gov

IT Team:

► John Anglemier (503) 378-4650 John.Anglemier@oregon.gov
► Noemi Arismendez (503) 378-4645 Noemi.R.arismendez@oregon.gov
► Keri Ashford (503) 378-4680 Keri.A.Ashford@oregon.gov
► Laura Barna (503) 378-2468 Laura.Barna@oregon.gov
► Nick Betsacon Nicholas.Betsacon@oregon.gov
► Kelly Blanchard (503) 378-6602 Kelly.L.Blanchard@oregon.gov
► Karen DeHut (503) 378-4811 Karen.DeHut@oregon.gov
► Toby Giddings (503) 378-5345 Toby.Giddings@oregon.gov
► Kim Leeker (503) 378-4297 Kimberly.Leeker@oregon.gov
► Lori Nordlien (503) 378-6781 Lori.Nordlien@oregon.gov
► Jose Perfecto (503) 378-4654 Jose.Perfecto@oregon.gov
► Rachel Smith (503) 373-1058 Rachel.R.Smith@oregon.gov
► Stefani Tew (503) 373-0384 Stefani.Tew@oregon.gov

Here is the link to the DAS PS IT Business Center information:

▶ <http://www.oregon.gov/DAS/EGS/ps/Pages/IT-Procurement.aspx>

Here is the link to Office of the State CIO (OSCIO):

▶ <http://www.oregon.gov/DAS/OSCIO/pages/index.aspx>

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DOJ

STO and Analyst

Other?

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- Next Steps – Procurement Analyst

Timeline

	Process Step	Estimated Date	Actual Date
<input type="checkbox"/>	RFP Kickoff Meeting		
<input type="checkbox"/>	Agency develops Introduction, Project Definitions, Overview		
<input type="checkbox"/>	Workgroup develops schedule of events, method of solicitation, minimum requirements, minimum submission requirements, pre-proposal conference, proposal content requirement, evaluation criteria and process, Round 1 next step determination and competitive range, Round 2 procurement process submittal requirements, evaluation process and next step determination, reference check form, cost proposal, and insurance (this process could take a few weeks or several months)		
<input type="checkbox"/>	DOJ Works on Sample Contract		
<input type="checkbox"/>	Review workgroup documents with DOJ at onsite meeting (this could be more than one meeting depending on # of edits)		
<input type="checkbox"/>	Edit the workgroup documents		
<input type="checkbox"/>	Check with STO/Analyst on Stage Gate 2 endorsement		
<input type="checkbox"/>	Send final RFP and Attachments to DOJ for Legal Sufficiency Approval		
<input type="checkbox"/>	Approved RFP and Attachments Posted to ORPIN		
<input type="checkbox"/>	Conduct Pre-Proposal Meeting		
<input type="checkbox"/>	RFP Question/Clarification/Protest period ends		
<input type="checkbox"/>	Workgroup and DOJ (if necessary) works on Question/Clarification/Protest submittals.		
<input type="checkbox"/>	PS posts response to Question/Clarification/Protest		
<input type="checkbox"/>	Solicitation Closes		
<input type="checkbox"/>	PS determines responsiveness of proposals (pass/fail)		
<input type="checkbox"/>	PS facilitates evaluation kick-off meeting		
<input type="checkbox"/>	Evaluations – 2 nd Meeting		

<input type="checkbox"/>	PS tabulates scores to determine Competitive Range, or highest ranked		
<input type="checkbox"/>	PS issues Notice of Competitive Range or Intent to Award		
<input type="checkbox"/>	Interviews/Presentations/Demos – includes final evaluations		
<input type="checkbox"/>	Intent to Award – notify successful Vendor and unsuccessful Vendors		
<input type="checkbox"/>	Award Protest Period ends		
<input type="checkbox"/>	PS responds to protests with workgroup and DOJ input		
<input type="checkbox"/>	Contract negotiation with Vendor		
<input type="checkbox"/>	Check with STO/Analyst on Stage Gate 3 endorsement (before contract signature)		
<input type="checkbox"/>	Collect all HB2375 Advice for Contract Verification Form		
<input type="checkbox"/>	If Stage Gate 3 endorsement, HB2375 Form signed, and DOJ Legal Sufficiency, sign Contract		

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Here is the link to the DAS PS IT Business Center information:

<http://www.oregon.gov/DAS/EGS/ps/Pages/IT-Procurement.aspx>

Here is the link to Office of the State CIO (OSCIO):

<http://www.oregon.gov/DAS/OSCIO/pages/index.aspx>

Office of the State CIO (OSCIO)
STO's (Strategic Technology Officer)

Updated 4/6/16

Jennifer Bjerke	STO Director
Ben Tate	education related agencies
Ethan Benatan	works with healthcare related agencies
Darrell Landrum	works with agencies that work with natural resources
Jared Choc	works with transportation and economic development agencies
Darren Wellington	works with public safety agencies
Heidi Zinsmann	works with administration agencies, boards and commissions