

Agenda

Enterprise Goods & Services

Customer Utility Board



Members:

- Ray Brixey – Chair**
Dept. of Corrections
- Bob Baxter– Vice-Chair**
Judicial Dept.
- Gail Shibley**
Oregon Youth Authority
- Cyndi Wickham**
State Lands
- Sean McCormick**
Military Dept.
- Tracy Wroblewski**
ODOT
- Caleb Yant**
OHCS
- Shawn Waite**
Dept. of Revenue
- Vickie Chamberlain**
Teachers Standards and Practices
- Merle Lindsey**
Oregon Liquor Exchange Commission
- Ron Bersin**
Oregon Government Ethics Commission
- Martin Pittioni**
Board of Accountancy
- DAS Support Staff:**
- Barry Pack**
Deputy Director
- Bret West**
EGS Administrator
- Janet Savarro**
DBS Administrator
- Robin Kirkpatrick**
DBS Analyst
- Debby Dyer**
Administrative Support

Meeting Date: **March 16th, 2016**
 Time: 10:00 a.m. – noon
 Location: Somerville Building | 775 Court St. NE

ITEM	PRESENTER	TIME
Welcome		
<ul style="list-style-type: none"> • February Minutes – review/approval • Action Items – None • Chair/Vice-Chair Meeting Update 	Ray Brixey	10:00-10:10
SLA Performance Reports		
<ul style="list-style-type: none"> • Risk (10 minutes) • P&D (10 minutes) • FBS (10 minutes) • SFS (10 minutes) • PS (10 minutes) 	Penny Evans Tim Hendrix Trudy Vidal Brad Cunningham Debbie Dennis	10:10-11:00
CUB Satisfaction Survey		
	Ty Hendrix	11:00-11:05
ORPIN Status		
17-19 move from Fees to Assessment	Bret West	11:05-11:15
POP's & Budget discussion		
	Bret West Robin Kirkpatrick	11:15-11:30
HB2375 and HB3099		
Current Status	Bret West	11:30-11:35
Seismic Shutoff Valve		
Current Status	Bret West	11:35-11:40
<p>Next Meeting: April 20, 2016 10am – noon Somerville Building 775 Court St. NE Salem, Oregon 97301</p>		

Minutes

Enterprise Goods & Services

Customer Utility Board



Members:

- Ray Brixey – Chair**
DOC
- Bob Baxter– Vice-Chair**
Judicial Dept.
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State Lands
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OLCC
- Tracy Wroblewski**
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- Caleb Yant**
OHCS
- Gail Shibley**
OYA
- Shawn Waite**
Dept. of Revenue
- Victoria Chamberlain**
Teachers Standards and Practices
- Ron Bersin**
Ethics Commission
- Martin Pittioni**
Board of Accountancy
- DAS Support Staff:**
- Barry Pack**
Deputy Director
- Janet Savarro**
DBS Interim Administrator
- Bret West**
EGS Administrator
- Robin Kirkpatrick**
DBS Analyst
- Debby Dyer**
Administrative Support

Meeting Date: February 17, 2016
Time: 10:00 -12:00 p.m.
Location: Somerville Building | 775 Court St. NE, Salem, OR 97301
Attendees: Ray Brixey, Cyndi Wickham, Caleb Yant, Vicki Chamberlain, Gail Shibley, Martin Pittioni, Sharon Domaschofsky for Merle Lindsey, Shawn Waite (called in), Debbie Strattman for Sean McCormick (called in)
Guests: SABS Coordinator: Shawn Range
 DAS: Barry Pack, Bret West, Robin Kirkpatrick
 Penny Evans, Zac Cartwright, Brad Cunningham,
Absent: Bob Baxter, Ron Bersin, Tracy Wroblewski

TOPIC	PRESENTER
Welcome	Ray Brixey
<ul style="list-style-type: none"> ▪ January minutes review – approved ▪ Action Item Review – <ol style="list-style-type: none"> 1. HB 2375/HB3099 status update – on agenda today 2. Bret will produce spreadsheet showing how he'll reduce Risk Fund - on today's agenda 3. Chair/Vice-Chair Meeting Update – talked budget and POPs 	
HB2375 and HB3099	Bret West
<p>HB3099:</p> <p>~ Debbie Dennis and Alex Pettit went before the Ways and Means IT subcommittee last Friday to request positions for a new IT Supply Chain Management Program. OSCIO is requesting two positions and Procurement Services is requesting four. A large part of the work will be to increase the number of statewide IT price agreements that are available for all agencies and local governments to use. There are currently about 103 agreements. By expanding the number of agreements to approximately 200-250, agencies and local governments will have more choice and it will be easier for them to purchase off these price agreements. Rather than having to go out for specific projects, RFP, etc. these price agreements would be in place primarily in partnership between the CIO's office and Procurement Services. The duties would be split in a way that the CIO's office would be setting the standards and identifying gaps in the current contracts. Procurement Services and the CIO's office would work together to get the statewide price agreements in place and the CIO's office would manage the vendor relationship. Procurement Services would still be responsible for the contract management. Debbie is asking for four positions – two that would assist with the expansion of the statewide price agreements and two because HB3099 changes the delegation levels for IT procurements and they expect to need additional staff to cover this. Alex is requesting two positions to assist with the CIO's portion of the work. Debbie and Alex will be up again today at 3:00 pm in the General Govt. Subcommittee of Ways and Means. The presentation outlines the concept in a very good way and even includes a matrix that illustrates (according to Gartner research) all of the ideal things you would do in a full blown IT Supply Management Program, the things we are already doing on an ad hoc basis, and the things we're not able to do at all while staffed as we current are.</p>	

Q: Have there been any discussions about how DOJ impacts some of these IT agreements? A specific example is the SAS or large software IT price agreement the Dept. of Corrections has. We tried to use one of the vendors off that price agreement but DOJ said we really couldn't use it. Ray asked if there would be any coordination on this.

A: HB2375 has some impact on that as well with the IT terms and conditions. The whole idea is to make it an easier, smoother process to purchase off of the price agreements.

~ Bret said on HB2375 they're finding that some of the attorneys are giving inconsistent advice, such as how to address the Director's notification. Bret and Barry will talk about it more on Monday.

~ Also on HB2375, the DPO Leadership Team has come together to look at the right mix of experience, training and education; determine what the gaps are and to also take a look at the canned trainings already in place with ODOT and other larger agencies. DPO Leadership will be making a recommendation as to what the training program should look like. The bill requires the training be put in place next year. They have requested three Limited Duration positions to help them continue this work, which they've been doing basically through job rotations and other non-permanent staffing arrangements. They have the LD request in for the remainder of this biennium and a POP in their budget for 2017-19 to make the LD's permanent. They're not sure if in the long run they'd actually need permanent positions but they wanted to start there and see what they learn during the course of this biennium with the LD's they have in place.

~ Regarding the IT Supply Management piece - Barry said part of Alex's vision and experience was that it's not just about increasing the number of statewide contracts and making it easier for agencies and local governments to buy off them; it's also about setting the direction for the state. What Alex would do is create "buckets": One for Leading Technology - where we want to be going; One for As-is Technology, similar to what we're doing now; and one for Lagging Technology, the items people still want to hang on to but we don't really want to see the state continue to invest in. These items are still available to buy but we're trying to steer people towards the Leading Technology bucket. Within those buckets will be "kits". An agency, particularly a small agency that would like to invest in a wireless capacity would not have to guess on what to buy. Everything would already be "kitted" in a catalog and available for purchasing.

Q: How do we get the word out about this?

A: This is probably a good topic to bring to an All Agency Directors' Meeting.

Project Music Update

Bret West

As DAS has been going through some of the pilot projects we've noticed that one of the more difficult things to do is trying to stay on top of the phone list: verifying the current set of phones and the phones that we will implement, i.e., making sure we have all the phones identified, get rid of those we don't need any longer and then make sure we've identified the ones we need for the staff we have. In a meeting last week with Hayley Sandburg in EGS Shared Financial Services, who is the current biller for all of the phone bills around the state, we identified a process improvement we will be talking to Jodie Jones and her team about. We think by having Hayley more involved in this process it will eliminate a lot of confusion on the part of agencies and the Project MUSIC team. Our experience as a pilot agency has helped us identify a potential process improvement effort and Bret said he will let the CUB know how it goes. Hopefully those agencies going sooner will find it much easier than it has been. Martin said from the small agency perspective it has been a little bumpy. Yesterday they received some data from the phone list and they realized how out dated that information was. They were also receiving phone calls from IBM asking questions. He said it's not easy to keep it all on track. Bret said that was why we want to do everything we can to help. This is an overall DAS

statewide project but we're also impacted as an agency. Our implementation at P&D has been delayed a bit because of some other issues but it has allowed us to really get a better grasp on how we can help the project and help all of you.

Q: Are other agencies having issues with Century Link?

A: Yes, it's happened several other times.

Q: Is it a problem with DPSST?

A: I don't know.

Q: How long has it been delayed - a week or so?

Q: Did you get an updated schedule?

A: Tim Hendrix said right now P&D is on hold. IBM might be able to tell them this afternoon that it's a Go but they're waiting on Century Link. There is no new schedule out yet.

Bret said the project team is learning from us and the pilot agencies, which will help make it easier for everyone else.

Seismic Shutoff Valve

Bret West

Rex Emery with the Oregon Youth Authority is excited to be a part of the seismic shutoff valve project. He has proposed hiring an intern to help build a business case so we can be sure that installing seismic shutoff valves is the right thing to do. We believe it is and our insurance companies also believe it is. They're very excited to hear that we were beginning this process. The business case hasn't been completed yet and Bret said he can give a quarterly update if the CUB is interested.

Datamart Query Tool Replacement

Bret West

Bret clarified that FBS will be replacing the Datamart reporting tool, not the platform. The platform and technology will stay the same. We had one additional product demonstration this month. Aaron Wallace is writing the business case for the replacement project. We factored the cost of the project into the current FBS budget and we think we can replace it with current resources. We will keep you posted as we go along. Trudy was contacted by ODOT and they're interested in either partnering or learning from what we know so far. Trudy is meeting with ODOT possibly this afternoon.

Risk Management Funding Level

Bret West

Bret said the spreadsheet handed out at last month's meeting has been updated a bit because we have newer assumptions for what the overall cost of risk administration will be. The assumption Bret put in for commercial insurance was inflated over current amounts and by what we're seeing the cost of commercial insurance has actually declined. The net effect is almost the same so what we're proposing for next biennium is a flat assessment. The left side of a spreadsheet handed out shows 2015-17 LAB amounts. The projected cash balance changed slightly due to some additional changes in the accounts receivable area. The goal is to try to keep the projected ending balance under \$100M. In looking at the projected costs we think the \$107,250,203 assessment amount we have for the current biennium is the way to go. We think it will accomplish the goal of keeping a healthy balance but not too healthy. At last month's CUB meeting Bret committed to providing a spreadsheet demonstrating how over time we would step down the ending balance. He was not able to provide it because the actuarial report only projects out through 17-19.

Q: What are the DHS and Shelter Workshops items on the bottom of the worksheet?

A: The items at the bottom left of the sheet are current expenditures through 12/31/15, \$18.98M. We did a straight line biennial projection of the current costs to get us to the \$75.9M. The DHS and Sheltered Workshops items are two large settlements that we had agreed to which have not yet hit the financial system. We just paid a portion out last week – \$5.25M. The projection of \$102.4M is what I

believe is the likely cost of risk for this biennium. We compared that to the total 2017-19 projected risk cost of \$110.9M (upper right side of the spreadsheet in bold). We feel comfortable that we are in the ballpark with that straight line projection and the known issues factored into it. This leaves about \$8M cushion.

- ~ **CUB decision:** A motion to adopt the proposed funding levels was made and seconded. The motion consists of the 2017-19 estimate of \$202M total projected cash, the accounts receivable of \$105.6M projected total for 17-19, ending with projected balance of \$96.8M and \$107,250,203M billing. The motion was passed.
- ~ Robin said we now have the overall billing number and that the Risk staff is working very diligently to come up with what the agency impacts are and what the allocations will be based on the total assessment for 2017-19 being the same as that for 2015-17. He expects the new risk charges to be very close to what each of the agencies paid last time around; but he also said we don't have the final allocation yet. Bret said the EGS CUB approved some methodology changes that will make the allocation a bit different for agencies. Allocation changes driven by claims experience and insured value will also be factored in.

Wrap Up

Barry Pack

Improving Government report:

- ~ We gave our report on shared services to the General Govt. Subcommittee two weeks ago and Barry thought it went well. One of the issues we discovered in the budget note report was the spectrum of the amount of services that agencies are sharing and the formality in which they do that. We have everything from full service level agreements with very detailed hourly or monthly rates to a wink, a nod, and a handshake and "we'll help you out if you're under staffed at a point in time" and everything in between. There is a lot of interest in seeing some standardization being brought to the chaos that is sharing in administrative services right now and a good recognition that one size doesn't fit all. There can't be just a single way of doing this and that you might have multiple standard methodologies for the formality and the cost recovery if agencies want to share in administrative services work. It was a good discussion with the Subcommittee; they were interested and Barry felt the conversation would probably be ongoing.

- ~ Martin made the comment that Brad's shop has it completely together, at least on his end and everything is completely set: He has a contract, everything relates to the billing and it works incredibly well. EHRS was the second one to come online and we have a contract, there were a couple of issues around the billing that Brad's shop helped work out and I could tell the gears inside were working. They're still trying to figure it all out and trying to be patient while it's being worked out. But, even within DAS there's still quite a bit of level of diversity where each unit is at with respect to figuring out the new world that's out there.

- ~ Barry said his point is well taken and recognized but CUBS are at different levels of maturity and I think the programs within DAS are at different levels of maturity. One of the things that is happening with the reorganization in both the HR world and the IT world we're going to get a better handle on some of that. Martin said he would continue to be patient.

- ~ Bret wanted to acknowledge Vicki and the Oregon Teachers Standards and Practices Commissions receiving an "A" rating on student safety. Vicki said student safety is a really big deal. We have to take care of the conditions in the classroom. The under-funding of education over the years has created a stressful environment in the everyday world of K-12.

For the Good of the Order:

All

- ~ Regarding the IBM phone piece – Brad said they have come up with some efficiencies within DAS regarding the billing piece once all the phones are fully implemented. They would be happy to share what they're doing, what they're putting in place, and the workflow. They are working on translating the IBM

acronyms so it won't be so difficult for everyone. Bret said Tim Hendrix might be another resource.

Q: Do we have any idea of the timeline for the rollout? Is there a plan; are agencies joining as they're ready and willing?

A: Bret said he is mostly focused on DAS so he doesn't know about the other agencies. Barry said there is a schedule; he has not seen the master schedule, just the DAS schedule. Outreach has been done to agencies by the project team for blackout dates.

~ Vicki said they are implementing a new NIC system built for them and it has been a bumpy road but they're hopeful about the final product.

~ Martin wanted to acknowledge and said he appreciated the invite that went out last week for chair/vice-chair meeting. He doesn't know what the follow up plans are because this is obviously a work in progress but whenever DAS thinks it's the right time to circle back and keep that level of openness is much appreciated. Barry said the work of the CUBs is not over when DAS puts out the price lists with budget instructions. It's just the start pointing of a much deeper engagement about the overall rates. Everyone's budgets are going to increase just as a matter of course and we have something we would like to do to improve service to be prioritized and evaluated so we have to start high with the price list so it goes down. That's an ongoing conversation and we will be bringing back the EGS rates here for a deeper look in the coming months and we'll have other opportunities to look at the full DAS budget down the road.

Next Meeting:

March 9, 2016

10 am – Noon

Sommerville Building | 775 Court St.

SLA Quarterly Performance Report							
Name of Program/ Division		DAS Risk Management				In compliance	
Reporting Period		Q4 2015 (Oct-Dec)				Out of Compliance	
						No Data or Lack of Target	
Measure #	Performance Measure	Target	3 Previous Quarters			Q4 2015 (Oct-Dec)	Trend
			Q1 2015 (Jan-Mar)	Q2 2015 (Apr-Jun)	Q3 2015 (Jul-Sep)	Current	
1	% of times 1st contact with customer is within 3 business days of the claim being received/reported	90.0%	97.0%	96.5%	93.5%	93.8%	
	# of claims with 1st contact within 3 business days		515	474	551	513	
	Total # of claims submitted		531	491	589	547	
2	Average # of days from restoration claim report date to close date	110	75.4	95.9	92.0	81.7	
	Sum of the days elapsed between report and closure		14,333	18,317	15,464	13,884	
	Total # of restoration claims closed		190	191	168	170	
3	Average # of days from liability claim report date to close date	180	151.7	150.1	165.5	159.7	
	Sum of the days elapsed between claim report date and close date		341,212	330,894	369,055	346,500	
	Total # of liability claims closed		2,249	2,205	2,230	2,170	
4	% of times SAIF provides a decision within 60 calendar days	90.0%	93.5%	93.0%	93.0%	93%	
	Total # of claims where a decision was made within 60 days		1,423	1,650	1,645	1,652	
	Total # of claims with a decision made		1,522	1,774	1,768	1,782	
5	Average cost per closed restoration claim	Tracked as a monitoring metric	\$8,784.57	\$10,244.07	\$10,451.83	\$12,203.06	
	Total costs associated with restoration claims		\$1,686,637.44	\$1,966,860.87	\$1,829,071.00	\$2,245,362.73	
	Total # of restoration claims closed		192	192	175	184	
6	Average cost per closed liability claim	Tracked as a monitoring metric	\$23,210.10	\$21,785.04	\$24,843.44	\$23,828.48	
	Total costs associated with liability claims		\$16,293,491.08	\$15,140,602.67	\$18,433,832.00	\$16,703,767.25	
	Total # of liability claims closed		702	695	742	701	
7	Average cost per non-severe WC claim	Tracked as a monitoring metric	\$3,603.60	\$3,614.30	\$3,402.88	\$3,863.92	
	Total costs incurred for all non-severe WC claims		\$4,854,055.00	\$4,951,589.27	\$4,546,252.27	\$5,274,257.00	
	Total # of WC claims filed		1,347	1,370	1,336	1,365	
8	Average cost per severe WC claim	Tracked as a monitoring metric	\$58,324.73	\$59,110.92	\$46,298.47	\$51,237.32	
	Total costs incurred for all severe WC claims		\$10,206,827.00	\$10,167,079.09	\$10,833,842.88	\$9,837,565.00	
	Total # of WC claims filed		175	172	234	192	
9	Average rating of safety training programs provided by SAIF (1-5)	4	4.6	4.6	4.5	4.5	
	Sum of the ratings given by survey respondents		292	349	134	89	
	# of survey responses received		63	76	30	20	
10	Average # of business days to deliver an ad-hoc Risk report	2	1.5	1.5	1.0	1.4	
	Sum of the days elapsed between request and delivery		21	6	2	14	
	# of custom ad-hoc Risk reports delivered		14	4	2	10	
11	Average # of training hours received by Risk analysts and adjusters	20	21.1	13.5	12.9	23.0	
	Total # of training hours received by Risk analysts/adjusters		337	189	180.5	299.3	
	# of Risk analysts/adjusters		16	14	14	13	

Comments for Performance Measures

Instructions: Enter comments in the box below the heading for "General Comments" for the specific performance measure you wish to enter comments about. **Click on the measure** on the left to return to the worksheet to which you wish to go back.

Measure	Comments
1. % of times 1st contact with customer is within 3 business days	<p align="center">General Comments</p> <p>We are within the target on this measure. We are down an adjuster currently as we wait for a temp contract to be finalized. The team has done well to keep this metric on target in spite of the challenges with an increased workload.</p>
2. Average # of days from restoration claim report date to close date	<p align="center">General Comments</p> <p>Good collaboration between Risk and our customers ensures we are able to meet this target.</p>
3. Average # of days from liability claim report date to close date	<p align="center">General Comments</p> <p>The collective experience of the Claims team allows us to be vigilant in meeting our target and in providing best outcomes to our agencies.</p>
4. % of times SAIF provides a decision within 60 calendar days	<p align="center">General Comments</p> <p>Results remain steady and within statutory requirements.</p>
5. Average cost per closed restoration claim	<p align="center">General Comments</p> <p>Up slightly over 3rd quarter due to 2 additional losses over \$100K. Q3 had 6 losses over \$50K and Q4 has 8.</p>
6. Average cost per closed liability claim	<p align="center">General Comments</p> <p>Average remaining steady for now. Anticipate increase over next few quarters due to several high dollar claims that were recently paid or will be paid soon.</p>
7. Average cost per non-severe WC claim	<p align="center">General Comments</p>
8. Average cost per severe WC claim	<p align="center">General Comments</p>
9. Average rating of safety training programs provided by SAIF	<p align="center">General Comments</p>
10. Average # of business days to deliver an ad-hoc risk report	<p align="center">General Comments</p> <p>Increase in number of requests likely related to agency consultations which were primarily in the last quarter of the year.</p>
11. Average # of training hrs received by Risk analysts and adjusters	<p align="center">General Comments</p> <p>Goal exceeded for calendar year 2015.</p>

Name of Program/ Division	Risk Management
Date report is finalized	3/2/2016
Reporting Period	Q4 2015 (Oct-Dec)

Report on Formal complaints received in the previous quarter

Formal complaints raised by customers using the designated email or alternative electronic means cited on SLA during the last quarter

Complaint #	Date received	Complaint Type	Complainant (Agency and, if applicable, Dept.)	Affected Customer (s)	Description

SLA Quarterly Performance Report							
Name of Program/ Division		DAS Publishing and Distribution				In compliance	
Reporting Period		Q4 2015 (Oct-Dec)				Out of Compliance	
						No Data or Lack of Target	
Measure #	Performance Measure	Target	3 Previous Quarters			Q4 2015 (Oct-Dec)	Trend
			Q1 2015 (Jan-Mar)	Q2 2015 (Apr-Jun)	Q3 2015 (Jul-Sep)	Current	
1	% of times P&D estimates are delivered within 1 business day after initial consultation	90.0%	81.0%	100.0%	100.0%	100.0%	
	# of estimates delivered within 1 business day		17	7	11	11	
	Total # of estimates delivered		21	7	11	11	
2	% of times P&D meets the agreed upon delivery date for design jobs	99.0%	89.8%	88.9%	95.3%	94.4%	
	# of design jobs delivered by the agreed upon delivery date		44	16	41	17	
	Total # of design jobs delivered		49	18	43	18	
3	% of times P&D meets the agreed upon delivery date for production jobs	96.0%	98.5%	98.2%	98.7%	98.9%	
	# of production jobs delivered by the agreed upon delivery date		962	1,481	2,061	2,011	
	Total # of production jobs delivered		977	1,508	2,088	2,033	
4	% of times P&D meets the agreed upon delivery date for mail jobs	98.0%	97.2%	98.4%	98.3%	97.5%	
	# of mail jobs delivered by the agreed upon delivery date		517	505	681	575	
	Total # of mail jobs delivered		532	513	693	590	
5	% of jobs that need re-work per customer request	2.0%	1.3%	1.3%	1.2%	1.1%	
	# of jobs that need rework per customer request		20	19	34	30	
	Total # of jobs delivered		1,558	1,508	2,824	2,641	
6	% of delayed print jobs where the customer was notified timely	99.9%	100.0%	100.0%	100.0%	100.0%	
	# of delayed print jobs where the customer was notified timely		1	2	1	1	
	Total # of delayed print jobs		1	2	1	1	
7	# of reported "double stuffing" mailing incidents	0	5	1	2	3	
8	% of times shuttle drivers adhere to schedule	95%	77.0%	80.7%	86.0%	83.7%	
	# of programmed shuttle stops on schedule		3,139	2,829	2,885	8,391	
	Total # of shuttle mail stops made		4,077	3,505	3,356	10,022	
9	% of times P&D drivers meet the agreed upon schedule	100%	100.0%	100.0%	100.0%	100.0%	
	# of collections/deliveries within the agreed upon schedule		123	205	129	174	
	Total # of collections/deliveries made		123	205	129	174	
10	Percent of mail posted and sent out at the reduced postal rate	96%	98.0%	98.9%	97.0%	98.8%	
	# of mail pieces at reduced postage rate		7,329,723	6,985,499	6,742,691	7,751,415	
	Total # of mail pieces posted		7,477,659	7,061,503	6,949,713	7,847,673	

Comments for Performance Measures

Instructions: Enter comments in the box below the heading for "General Comments" for the specific performance measure you wish to enter comments about. **Click on the measure** on the left to return to the worksheet to which you wish to go back.

Measure	Comments
	General Comments
1. % of times P&D estimates are delivered within one business day after initial consultation	
	General Comments
2. % of times P&D meets the A.D.D for design jobs	
	General Comments
3. % of times P&D meets A.D.D for production jobs	
	General Comments
4. % of times P&D meets the A.D.D for mail jobs	
	General Comments
5. % of jobs that need to be redone per customer request	
	General Comments
6. % of delayed print jobs where the customer was notified timely	
	General Comments
7. # of reported "double stuffing" mailing incidents	
	General Comments
8. % of times shuttle drivers adhere to schedule	Summary % On Time (Salem) 88.83% Summary % On Time (South Routs - Eugene) 77.53% Summary % On Time North Routs - Portland) 81.30%
	General Comments
9. % of times P7D drivers meet the agreed upon schedule	
	General Comments
10. % of mail posted and sent out at the reduced postal rate	

Name of Program/ Division

PUBLISHING AND DISTRIBUTION

Reporting period

Q4 2015 (Oct-Dec)

Report on Formal complaints received in the previous quarter

Formal complaints raised by customers using the designated email or alternative electronic means cited on SLA during the last quarter

Complaint #	Date received	Complaint Type	Complainant (Agency and, if applicable, Dept.)	Affected Customer (s)	Description

SLA Quarterly Performance Report

Name of Program/ Division

DAS Financial Business Systems

In compliance

Reporting Period

Q4 2015 (Oct-Dec)

Out of Compliance

No Data or Lack of Target

Measure #	Performance Measure	Target	3 Previous Quarters			Q4 2015 (Oct-Dec)	Trend
			Q1 2015 (Jan-Mar)	Q2 2015 (Apr-Jun)	Q3 2015 (Jul-Sep)	Current	
1	% of Datamart downloads from SFMA and OSPA successfully completed	97%	100.00%	93.75%	93.75%	100.00%	
	# of SFMA and OSPA downloads successfully completed		16	15	15	17	
	Total # of scheduled SFMA and OSPA downloads		16	16	16	17	
2	% of SFMA nightly batch cycles completed successfully	97%	100.00%	100.00%	100.00%	100.00%	
	# of scheduled batch cycles successfully completed		61	64	64	62	
	Total # of batch cycles scheduled		61	64	64	62	
3	% of compliance-related OSPA updates released before the mandated due date	90%	96.77%	100.00%	100.00%	100.00%	
	# of mandatory application updates completed before the due date		30	11	8	6	
	Total # of mandatory application updates due		31	11	8	6	
4	% of complete manual checks delivered/processed within the same day, if request received before cutoff	99%	100.00%	100.00%	100.00%	100.00%	
	# of manual check requests delivered within the same day		2,522	3,180	5,156	3,528	
	Total # of manual check requests		2,522	3,180	5,156	3,528	
5	% of PERS records suspended due to inaccurate information	3%	1.68%	1.29%	1.41%	1.48%	
	# of records sent to PERS that are suspended		2,020	1,579	1,779	1,844	
	Total # of records sent to PERS		120,009	122,199	126,138	124,235	
6	% of unusual/potentially suspicious SPOTS Card transactions communicated to agencies within one business day	95%	100.00%	100.00%	100.00%	100.00%	
	# of suspicious transactions found in SPOTS card report that were communicated within 1 business day		9	1	2	4	
	Total # of suspicious transactions found in SPOTS card reports		9	1	2	4	
7	% of Shared Payroll Services' client agency paychecks that are delivered within the timeframe applicable to each pay check	99%	100.00%	99.95%	99.98%	100.00%	
	# of paychecks that were processed within applicable timeframe		5,792	5,791	5,477	5,502	
	Total # of paychecks requested		5,792	5,794	5,478	5,502	

Comments for Performance Measures

Instructions: Enter comments in the box below the heading for "General Comments" for the specific performance measure you wish to enter comments about. **Click on the measure** on the left to return to the worksheet to which you wish to go back.

Measure	Comments
<p>% of SFMA and OSPA downloads completed successfully.</p>	<p align="center">General Comments</p> <p>The "GL Summary" table did not load properly over the weekend. We discovered the issue late Monday and reloaded it in the evening. On Tuesday morning, this table was back to normal working order.</p>
<p>% of nightly batch cycles successfully completed.</p>	<p align="center">General Comments</p>
<p>% of compliance-related OSPA updates released before the mandated due date.</p>	<p align="center">General Comments</p>
<p>% of checks delivered/processed within the same day.</p>	<p align="center">General Comments</p>
<p>% of PERS records suspended.</p>	<p align="center">General Comments</p>
<p>% of unusual/potentially suspicious transactions notified to agencies within one business day.</p>	<p align="center">General Comments</p>
<p>% of Shared Client Services' client agency paychecks that are delivered with the timeframe applicable to the circumstance.</p>	<p align="center">General Comments</p> <p>Of the 9 manual checks not issued within standard turnaround one (1) was due to SPS delay and 9 due to HR/Employee delay. NOTE: The first quarter reporting contained only counts for manual checks. This has been corrected in this report for both the current and past quarters.</p>

Name of Program/ Division

DAS Financial Business Systems

Reporting Period

Q4 2015 (Oct-Dec)

Report on Formal complaints received in the previous quarter

Formal complaints raised by customers using the designated email or alternative electronic means cited on SLA during the last quarter

Complaint #	Date received	Complaint Type	Complainant (Agency and, if applicable, Dept.)	Affected Customer (s)	Description

SLA Quarterly Performance Report							
Name of Program/ Division		DAS Shared Financial Services				In compliance	
Reporting Period		Q4 2015 (Oct-Dec)				Out of Compliance	
						No Data or Lack of Target	
Measure #	Performance Measure	Target	3 Previous Quarters			Q4 2015 (Oct-Dec)	Trend
			Q1 2015 (Jan-Mar)	Q2 2015 (Apr-Jun)	Q3 2015 (Jul-Sep)	Current	
1	% of transactions submitted by customers with accurate & complete information while in compliance with OAM	93.0%	93.1%	96%	94.6%	95.7%	
	# of accounting transactions successfully submitted		47,310	49,912	56,311	52,392	
	Total # of accounting transactions submitted		50,835	51,936	59,510	54,729	
2	% of accounts payable requests processed within 10 business days	95.0%	93.7%	95.1%	95.2%	92.2%	
	# of AP requests processed within 10 business days		12,354	14,552	12,914	16,442	
	Total # of AP requests processed		13,187	15,306	13,562	17,837	
3	Average # of days to communicate payment request incident	4	4.6	2.3	1.7	1.9	
	Total # of days to communicate AP request incidents		546	565	317	566	
	Total # of AP request incidents		118	249	183	297	
4	% of accounts receivable requests processed within 10 business days	95.0%	No Data	99.8%	99.6%	98.0%	
	# of AR requests processed within 10 business days			13,385	16,006	13,786	
	Total # of payment requests processed			13,412	16,075	14,071	
5	% of client agencies budget projection reports submitted within 30 days of accounting month end close	97.0%	100%	98.8%	88.0%	100.0%	
	Total # of budget projections provided within 30 days of close		84	81	66	60	
	Total # of budget projection reports submitted		84	82	75	60	

Comments for Performance Measures

Instructions: Enter comments in the box below the heading for "General Comments" for the specific performance measure you wish to enter comments about. **Click on the measure** on the left to return to the worksheet to which you wish to go back.

Measure	Comments
1. % of transactions submitted by customers with accurate & complete information while in compliance with OAM	<p align="center">General Comments</p>
2. % of accounts payable requests processed within 10 business days	<p align="center">General Comments</p> <p>A few items contributed to a lower rate for this quarter: 1. Due to this being the final closeout of the 13-15 biennium, there was a much higher transaction count as compared to prior quarters. 2. There are more holiday and vacation days in this timeperiod, which contributed to slower processing times. 3. The Accounts Payable was the unit who gave up a position due to improved work efficiencies, so this unit is doing the same amount work with 1 less FTE.</p>
3. Average # of days to communicate payment request incidents	<p align="center">General Comments</p>
4. % of account receivable requests processed within 10 business days	<p align="center">General Comments</p>
5. % of client agencies budget projection reports submitted within 30 days of accounting month end close	<p align="center">General Comments</p> <p>Although the Department of Geology & Mineral Industries (DOGAMI) is a client agency, SFS did not submit budget projection reports from OCT - DEC 2015. SFS has been collaborating with DOGAMI to ensure we have made accurate financial revisions for prior bienniums, as well as working through complex financial details for the current biennium. Once these areas are as accurate as possible, SFS will begin to provide budget forecasts for the remainder of 15-17.</p>

Name of Program/ Division

DAS Shared Financial Services

Reporting Period

Q4 2015 (Oct-Dec)

Report on Formal complaints received in the previous quarter

Formal complaints raised by customers using the designated email or alternative electronic means cited on SLA during the last quarter

Complaint #	Date received	Complaint Type	Complainant (Agency and, if applicable, Dept.)	Affected Customer (s)	Description

SLA Quarterly Performance Report							
Name of Program/ Division		DAS Procurement Services				In compliance	
Reporting Period		Q4 2015 (Oct-Dec)				Out of Compliance	
						No Data or Lack of Target	
Measure #	Performance Measure	Target	3 Previous Quarters			Q4 2015 (Oct-Dec)	Trend
			Q1 2015 (Jan-Mar)	Q2 2015 (Apr-Jun)	Q3 2015 (Jul-Sep)	Current	
1	% of contract quality surveys stating contract met business needs	85.0%	No Data	No Data	No Data	85.7%	
	# of respondents who answered yes to specific question					6	
	Total # of survey responses					7	
2	% of contracts completed by the agreed upon date	85.0%	No Data	70.1%	58.2%	50.0%	
	# of contracts signed by the agreed upon date			188	153	126	
	# of contracts signed			268	263	252	
3	# of complaints on statewide price agreement vendor performance	TBD	2	0	0	4	
4	% of statewide price agreements with "how to buy" guides	15.0%	No Data	17.2%	18.1%	35.3%	
	# of statewide price agreements with a "how to buy" guide			57	58	146	
	Total # of statewide price agreements			331	320	414	
5	Average rating of ease of use of statewide price agreements (1-10)	7.5	No Data	7.2	5.4	6.2	
	Sum of the ratings to specific question			79	49	111	
	Total # of survey responses			11	9	18	
6	Average rating of ORPIN help desk staff effectiveness (1-10)	9	8.7	9.0	9.7	9.7	
	Sum of the ratings to specific question		262	423	300	29	
	Total # of survey responses		30	47	31	3	
7	Average # of hours to resolve an ORPIN technical support request	TBD	No Data	No Data	3.5	5.1	
	Total # of hrs spent providing support/response to requests				69.7	132.0	
	Total # of tickets closed				20	26	
8	Average overall satisfaction rating by employees who have finished any procurement training course (1-10)	8	9.3	9.2	8.7	8.8	
	Sum of the ratings given by survey respondents		539	514	287	405	
	Total # of survey responses		58	56	33	46	

Comments for Performance Measures

Instructions: Enter comments in the box below the heading for "General Comments" for the specific performance measure you wish to enter comments about. **Click on the measure** on the left to return to the worksheet to which you wish to go back.

Measure	Comments
1. % of contract quality surveys stating contract met business needs	<p style="text-align: center; background-color: #0070C0; color: white; margin: 0;">General Comments</p> <p>This is the first quarter this PM was measured. The survey was sent out to 19 customers. These were selected from the set of customers for contract related tasks who received the EMPM11 customer satisfaction survey six months ago, over the course of one month. Since the survey was sent out close to the holidays (12/17/15) it is expected this could have affected the response rate of 37%. Also, because the survey was sent out only once at the end of the quarter the total number of customers surveyed is low. In future quarters this survey will be sent out three times a quarter. There was only one respondent answering "no" to the main survey question. The reason for the negative response was because of an error in expiration date set for the</p>
2. % of contracts completed within the agreed upon timeframe	<p style="text-align: center; background-color: #0070C0; color: white; margin: 0;">General Comments</p> <p>This PM is showing a downwards trend. It was noticed that PS staff does not consistently enter the completion date, resulting in a later date than the contract was actually completed. In addition, it appears that PS staff is not familiar with the option to update the due date after an agreement has been reached with the customer. Both factors will negatively affect this PM. Management is currently educating staff about correct time entry. However, since the EMPM11 customer satisfaction scores are also down, it seems that there are more issues that need further attention.</p>
3. # of complaints on statewide price agreement vendor performance	<p style="text-align: center; background-color: #0070C0; color: white; margin: 0;">General Comments</p> <p>The low number of complaints is the result of a general unawareness among customers that they have the opportunity to provide complaints on the DAS-PS website. Recently, a Buyer Link email was sent out to our customers alerting them about this opportunity for complaints. All four complaints were about statewide price agreements. Two were for the same PA which was about a website to place ads and there was trouble with getting the ads up. Another complaint was about a vendor showing up at the wrong time. The fourth one was not specific and was neutral in their comments.</p>
4. % of statewide price agreements with "How to buy" guides	<p style="text-align: center; background-color: #0070C0; color: white; margin: 0;">General Comments</p> <p>The total number of statewide price agreements that were active in Q4 is significantly higher as compared to the previous two quarters. There is no documentation regarding what was done in Q2 and Q3 to get these numbers. In addition, contract expiration dates are frequently updated. As a result it was not possible to update the data for Q2 and Q3 based on the method used for Q4. In addition, no list was kept for Q2 and Q3 marking which PA has a buyers guide. As a result it was decided to count buyers guides for all PAs active in Q4. Reporting on buyers guides in future quarters will be done through updating the Q4 list.</p>
5. Average rating of ease of use of statewide price agreements	<p style="text-align: center; background-color: #0070C0; color: white; margin: 0;">General Comments</p> <p>List of respondents was expanded after updating spend data (2012-2015 instead of 2007-2014) and relaxing spend thresholds (>\$5K in 2015 and >\$40K during 2012-2015 instead of >\$93K during 2007-2014). As a result the original list of 36 (used for Q3) was expanded to 67. Invitations were sent out to 48 names on this list with an active email address. Response rate was 38%. Comments for improvements cover a need for better price negotiation, involve stakeholders in what is needed, more consistency in documentation, difficulty finding PA's in ORPIN, more adequate notice before PA expires, quicker response needed for special procurements and sole source, more vendor options per PA, more training for agencies and management staff of do's and don'ts of procurement policy.</p>
6. Average rating of ORPIN help desk state effectiveness	<p style="text-align: center; background-color: #0070C0; color: white; margin: 0;">General Comments</p> <p>As a result of staff re-assignments no customers were identified to receive the weekly EMPM11 customer satisfaction survey with ORPIN help desk questions. An attempt was made to collect data based on the list with customer names on the SharePoint site which tracks ORPIN helpdesk cycle times (using incomplete list of all tasks for Q4 2015). However, since this survey is usually sent out a week after service is provided, these data might not be accurate given that for some tasks the survey was sent out three months after completion of the task. In addition, some of the respondents had more recent interaction with ORPIN and as a result their response would not reflect Q4 experiences. Response rate was low with only 3 out of 16 responding.</p>
7. Average # of hrs from receipt of request until closure	<p style="text-align: center; background-color: #0070C0; color: white; margin: 0;">General Comments</p> <p>ORPIN helpdesk cycle times increased because of a few tickets which lasted more than one day. All tasks taking more than one day had to do with setting up or changing user accounts. However, in other cases setting up or changing user accounts would take only a few hours. It seems that the help desk staff sometimes gets busy and does not get to complete a task till a few days later.</p>
8. Average overall satisfaction rating by employees who have finished any procurement training course	<p style="text-align: center; background-color: #0070C0; color: white; margin: 0;">General Comments</p> <p>Results from the weekly Entrepreneurial Management (EM) Model PM #11 (Customer Satisfaction) survey invitations constitute the data for this SLA Metric. The comments were in general positive. Positive comments mentioned that training was fun, educational, good pace, comprehensive, easy to follow, helpful in teaching the "why", able to use what was learned in job. Some of the mixed comments were about some people looking forward to more online classes whereas others were worried about too many online classes. The OPBC exam did not reflect what was taught during the classes. Some people commented on a class not being organized with no handouts, some mentioned the pace was too fast. The only negative comment was about that the survey after the completion of the class was not immediately available online.</p>

Name of Program/ Division

DAS Procurement Services

Reporting Period

Q4 2015 (Oct-Dec)

Report on Formal complaints received in the previous quarter

Formal complaints raised by customers using the designated email or alternative electronic means cited on SLA during the last quarter

Complaint #	Date received	Complaint Type	Complainant (Agency and, if applicable, Dept.)	Affected Customer (s)	Description
1					
2					
3					
4					