

OREGONBUYS AGENCY PLANNING MEETING

CORE TEAM
INTRODUCTORY KICKOFF



AGENDA

- Introductions
- Meeting Objectives
- ORPIN Replacement Plan & Activities
- Discussion of Current Procurement Methods
- Services/Support for Preparation
- Q&A

MEETING OBJECTIVES

- To establish basis for a productive working relationship with the Agency to prepare for ORPIN replacement;
- To collect additional information on Agency procurement methods, users, etc.
- To educate the Core Team on the scope and timing of the ORPIN replacement phase of the Enterprise project
- To collaborate on the best way of educating the core team on OregonBuys and its intended usage
- To establish the cadence of support services for Agency preparation

ORPIN REPLACEMENT PLAN

- Replace core functionality of ORPIN
- Focus on sourcing operations conducted by procurement professionals
- Limit operational impacts to minimize risks
- Three document types in OregonBuys
 - Open Market Requisition
 - Bid
 - Master Blanket Purchase Order
- No impact to Accounting operations or RSTARS interface

ORPIN REPLACEMENT PLAN: WHAT'S IN SCOPE

- Intermediate procurements by agencies (and where delegated authority is present) including posting of results/agreements
- Posting of agreements, emergency procurements, etc.
- Posting of Sole Source procurements by agencies
- Requests to DAS Procurement Services including Sole Source, Delegations, etc.
- Requests for DAS Procurement for On-behalf of procurement
- Formal procurements by DAS Procurement Services or agencies
- Support of “Buy” decision through Marketplace searching

ORPIN REPLACEMENT PLAN: WHAT'S OUT OF SCOPE

- Small procurements including posting of related results/agreements (Phase II)
- EIS and/or DOJ Reviews (will continue outside system as they do today)
- Purchase Orders, Receipts and Invoicing (Phase II)

KEY ACTIVITIES

- First
 - Initial meetings with large and medium agencies to review planned activities, discuss current procurement processes, etc.
- Next
 - Enterprise solution end-to-end testing (functional)
 - Orientation for Large/Medium agency Core Teams
- Then
 - Distribution of data collection spreadsheets (users, approvals, etc.)
 - Orientation for Agency administrators
 - “To Be” procurement process definition for large/medium agencies

KEY ACTIVITIES

- Next
 - Large/medium agency process testing
 - Online training courses available
- Finally
 - Build out/configuration of PROD by Agency administrators (and/or DAS)
 - End user training
 - User data uploaded to PROD

CONFIRMATION OF OPERATIONAL METRICS

- Number of “core” Procurement Users: Intermediate (written procurements – centralized/decentralized, locations, etc.)
- Number of Other Procurement users: “Quoting” process (centralized/decentralized, locations, etc.)
- Number of personnel who create/modify contracts or price agreements (centralized/decentralized, locations, etc.)
- Number of Other users that do Statewide/Agency PA searches
- Number of approvers associated with procurement/sourcing activities

CURRENT PROCUREMENT METHODS DISCUSSION

- Intermediate with detail: ITBs, RFPs, multi-stage, etc.
- Frequency of requests to DAS PS: formal procurement, delegation requests, sole source, etc.
- Specialized types of procurements: construction/public improvement, RFAs, A&E, etc.
- Review of how purchasing/procurement requests within the Agency are made and approved
- Other special cases?
- DAS delegation of authority to the Agency
- Procurement/sourcing delegated to program or field personnel: dollar thresholds, procurement methods, contracting, etc.

CORE TEAM PURPOSE & COMPOSITION

- Purpose: to make and document decisions related to Agency-specific use of OregonBuys
 - Solicitations, awards and contracting processes (including postings)
 - Requests to DAS PS
 - Organizational hierarchy, user roles, approval paths and custom columns (Agency-defined fields)
 - Become future “power users” of the future that understand OregonBuys and the agency’s use of it
- Representation on Core Team of major procurement stakeholders (based on review of types, etc. above)

CORE TEAM ORIENTATION APPROACHES

1. Overview/demonstration of Enterprise procurement solutions including Intermediate procurements, requests to DAS PS and contracting: (half day)
2. Item 1 above with a few hands-on exercises (full day)
3. Iterative approach: orientation/demo before the Core Team works on To Be process for specific set of processes (e.g., DAS requests, solicitations, contracts/PAs)
4. Combination of 1 and 3
5. AND - special session on users, organizational hierarchy, approvers – later in implementation (half day)
6. Others?

IN THE FUTURE: SERVICES/SUPPORT TO AGENCIES FOR PREPARATION

- Orientation for large/medium agency core teams
- Spreadsheets for data collection: users, approvals, depts/locations, etc.
- Training for agency administrators (ORG administrators)
- Periodic participation in Core Team meetings/discussions
- Consulting/advisement on key configuration decisions
- Functional test cases and support
- System uploads for user data
- End user training

AGENCY ACTION ITEMS

- Tweak Core Team (if recommended or needed)
- Respond to Core Team registry
- All members of Core Team should sign up for OregonBuys project newsletter
- Identify ORG Administrator
- Start/continue “As Is” process inventory



OTHER ITEMS



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THANK YOU!
