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

OREGBUY.INFO@OREGON.GOV

HTTPS://OREGONBUYS.OREGON.GOV
THANK YOU!