

## DPO Advisory Council Meeting

**Meeting Date:** August 28, 2019

**Time:** 1:30 – 3:30pm

**Location:** **ODF**  
 2600 State Street SE  
 Salem, OR 97301

**Attendees:** **Jordan Sim (DAS), Kelly Mix (DAS), Heather Wyland (ODF), Cort Dokken (DAS), Sharon Domaschofsky (OSP), Mandee Wilding (ODE), Lisa Ansell (Biz OR), Toni Payseno (DOC), Robert Jones (PERS), Jean Straight (DSL), Melissa Essar (ODA), Jessica Nelson (OHCS), Phillip Andrews (SOS), Carter Stein (DAS), Trish Hage (WRD), Jay Jackson (DAS), Whitney Stewart (ODF), David McKay (ODOE), Archana Thapa-Sherpa (DOJ), Jose Perfecto (OSL), VJ Narkon (CCC)**

**By Phone:** Kirk Rhodes (DHS), Michelle Johnson , Amber Forster (OYA)

ITEM	DISCUSSION
<b>Welcome/Announcements – Sharon Domaschofsky</b>	
	<ul style="list-style-type: none"> <li>• Introductions made.</li> <li>• June minutes approved.</li> </ul>
<b>Legislative Updates – Jay Jackson (DAS)</b>	
	<ul style="list-style-type: none"> <li>• Sent out Implementation Report – all highlighted bills are of statewide impact.</li> <li>• Will get initial draft of Administrative Rules in the next couple weeks.</li> <li>• Successor Contractor change – if a contract is terminated before contract is complete, contractor has to supply employment within 90 days of termination of the contract.</li> <li>• Any comments on the temporary rules need to be sent to Jay Jackson (<a href="mailto:Jay.Jackson@oregon.gov">Jay.Jackson@oregon.gov</a>)</li> </ul>
<b>OregonBuys Update – Chris Patchell (DAS)</b>	
Handout	<ul style="list-style-type: none"> <li>• Periscope is currently working with OregonBuys Team on:             <ul style="list-style-type: none"> <li>○ Working on deep dive with subject matter experts (SMEs) at DAS.</li> <li>○ Periscope is working on business process inventory.</li> <li>○ How would we meet all business needs within OregonBuys (Mapping site).</li> <li>○ Will design “prototypes” (end-to-end processes) in OregonBuys for testing by SMEs to verify workflows work correctly and that we have not missed any steps.</li> </ul> </li> <li>• Data gathering – survey was sent out a few weeks ago, please be sure to fill out and</li> </ul>

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	<p>send back, very important.</p> <ul style="list-style-type: none"> <li>• Taking a deeper look at the timeline – Really looking at the planning stage, once this is done we will recalibrate the timeline for implementation stage.</li> <li>• Need help spreading the word. DPO’s are vital to spread the word down the line. OregonBuys team is going to meetings to educate as many as possible on OregonBuys but it will be most helpful for DPO’s to pass to managers and teams.</li> <li>• Newsletter attached.</li> <li>• Monthly Forums – 90 mins to 2 hours. Each will have a topic including a Q &amp; A. For all to attend. First – Who are the core team for you to get together?</li> <li>• Carter Stein is DAS IT Project Management working on OregonBuys project.</li> </ul> <p><b>Question:</b> Is timeline still go-live March for ORPIN replacement? <b>Answer:</b> This is something that will be examined in the deeper look into the timeline.</p> <p><b>Question:</b> Are other agencies identifying SMEs and other experts? <b>Answer:</b> Yes, now is a good time to start identifying those key people in procurement and finance. Will get more information about how to identify these people at the Forum (info below).</p> <p><b>Question:</b> What audience do you want at forum? <b>Answer:</b> Bring everyone, procurement staff &amp; finance staff.</p> <p><b>Forum:</b>     Date: September 11<sup>th</sup> at 9:00-11:00am                   Location: Employment Auditorium.                   Topic: - Early Planning                               - Roles, Responsibilities and Skill Set for Core Team &amp; Organization Administrator.</p> <p><b>Find more info on Forums at</b> <a href="https://www.oregon.gov/das/ORBuys/Pages/forums.aspx">https://www.oregon.gov/das/ORBuys/Pages/forums.aspx</a></p> <p>The forum will be recorded and posted to the above website for reference if unable to attend in person. Please email OregonBuys Team (<a href="mailto:OregonBuys.Info@oregon.gov">OregonBuys.Info@oregon.gov</a>) with any questions.</p>
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**2019-2020 Rate Structure – Kelly Mix (DAS)**

Handout	<ul style="list-style-type: none"> <li>• The purpose of the DAS rates is to generate enough to run all operation costs for 60 days.</li> <li>• DAS wants them to be bearable for Agency customers – they have made adjustments to make simple to understand.</li> <li>• Before 2015, fees based on the number of full time employees in the Agency and</li> </ul>
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the Agency's Budget. Larger Agencies ended up paying more.

- Now, mostly charge fee for service, some assessments are done.
- VCAF – Vendor Collected Administrative Fee. Collected from vendors when you purchase off Statewide Price Agreement (PA).
- July 1, 2019 VCAF increased by 1% (some exceptions were made to the increase) to fund OregonBuys implementation.

**Question:** Will the rates go up on the PA's?

**Answer:** The majority have not asked for a rate increase. A few did but it will be the advertised rate in the PA.

**Comment:** For budgeting, we first project the amount we will receive by VCAF and then we fill in the vacancies with service fees.

- Training Fees: no changes – fees remain the same for '19-'20.
  - E-courses, webinars, regional trainings.
- Embedded Staff: Staff member still works for DAS PS but works on projects primarily for an Agency.
- Agency Specific Transaction Fees:
  - RFP, ITBs reduced rate from 3.9% to 2.4% of anticipated cost
  - Maximum fee cap increased to \$150k on RFP's only.

**Question:** How would you convey to programs how much to expect to pay for transaction fees?

**Answer:** see rate sheet

**Question:** When agency gets invoice – is there detail available on the line items?

**Answer:** There should be a page attached that separates out which charge is for which procurement.

- DAS 2019-2021 Pricelist (Pg. 31)  
<https://pricelist.dasapp.oregon.gov/report/pricelist.pdf?20190718>

**Price Agreements – Dion & Pam & Cort (DAS)**

- Dion Kerléé: Language Services (began 2014)
  - Translation Service – 36 proposals, 5 evaluators made recommendations to award to all 36.
    - Currently 20 have responded, 5 have executed agreements.
    - Proposers who included a value added service (early payment discount)

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- 23 proposers indicated 2-3% discount if paid within 45 days.
- 1 indicated 6% if paid within 10 days
- 1 indicated 8% if paid within 10 days.
- Sustainable practices: 10 received all points for participating; 6 did not receive any points at all.
- 9 are COBID firms, 7 of which are Oregon COBID
- In-person interpreting – coming up next.
  - Does not include phone, or video.
  - 10 state employees 4 ORCPP on sourcing team.
  - Hoping to post RFP in October.
- Written Translation – in September
- Interpreting Services – in September
- ASL – Statewide in October/November

**Question:** ASL video, is that a possibility?

**Answer:** Will more than likely be covered in Video/Remote RFP.

**Question:** What did you do for VCAF?

**Answer:** Anyone who utilizes subcontractors is subject to VCAF, those who use their own in-house employees does not charge VCAF.

- Pam Johnson: Chairs & Phones
  - New wireless agreement – Devices, Emergency Preparedness, Satellite Phones, Discount Cell & Hughes Satellites
    - Will have agreements with Verizon, Sprint/T-Mobile, AT&T
    - Should be in-place by December (Existing expires 12/31/19)
  - Office Seating Agreement – awarded 6 agreements
    - HON is now on office seating & office furniture
    - Office Seating extravaganza – vendors brought in chairs to test out and to meet suppliers.
    - Suppliers: Office Master, HON, Global, Ergo centric, Reimers, Herman Miller
    - Now we have all types of office chair you need, not just ergonomic desk chairs.
    - Buyers guide is available. Includes the key things you'll need to note when pricing out your order. PO Language is in there also.
    - Office Task Chair quote form – BVA, makes it fair for suppliers.

**Question:** Did you reach out to other agencies to find SMEs for furniture?

**Answer:** Yes, we had an ODOT member, a ORCPP member, someone from OHA as

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	<p>well as RISK.</p> <p><b>Question:</b> When did this begin?  <b>Answer:</b> April.</p> <ul style="list-style-type: none"> <li>• Cort – Kaliska King’s PA’s (Airlines, P-cards)       <ul style="list-style-type: none"> <li>○ Southwest Airlines (ending Sept 27, 2019)           <ul style="list-style-type: none"> <li>▪ Must book flight before 9/27/19 and have flown by 12/31/19</li> </ul> </li> <li>○ P-cards with US Bank expires 12/31/2020 (NASPO Contract)           <ul style="list-style-type: none"> <li>▪ Washington State (lead state) has put out solicitation - once awarded Oregon will do a Participating Addendum.</li> </ul> </li> </ul> </li> <li>• Cort Dokken – IT Service Management       <ul style="list-style-type: none"> <li>○ The State now has mandatory and convenience use Information Technology Service Management (ITSM) contracts in place:           <ul style="list-style-type: none"> <li>▪ Axios Systems is Mandatory use for State entities.</li> <li>▪ CDW-G selling Ivanti is for Convenience.</li> <li>▪ ITSM used to be helpdesk only software. It is much more now including; IT asset tracking, other than IT workflow and approval paths, IT operations management, and automation etc.</li> <li>▪ John Anglemier will be rolling out the services for the products shortly.</li> </ul> </li> </ul> </li> </ul>
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**Chemeketa Community College – Procurement & Supply Chain Management Program – Vicky**

Handout	<ul style="list-style-type: none"> <li>• New Focused Certificate for Procurement – geared toward working professionals.</li> <li>• 6 core classes to get the certificate.</li> <li>• Also have 1 year certificate and 2 year degree</li> <li>• Now have a seamless glide path with OSU to transfer from CCC to OSU for a bachelor’s degree.</li> <li>• Will now be working with PSU to make the same transfer option.</li> <li>• Transportation &amp; Logistics class is hybrid</li> <li>• Beginning Spring Term</li> <li>• BA 235 Procurement for State and Local Government – based on NASPO Practical Guide (Coming up in September).</li> <li>• Dedicated scholarship money</li> </ul> <p><b>Questions:</b> Is there a push to suppliers?  <b>Answer:</b> We do not push information to suppliers, but we do to CCBI and other continuance.</p> <p><b>Question:</b> Push to high schools?</p>
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**Answer:** Yes, we go to charter schools & high schools as well as attend career fairs.

**CPO Update – Debbie Dennis (DAS)**

- Staffing Changes:
  - Amy Velez – promoted to Communications Lead & Change Management Lead for OregonBuys.
  - Courtney Parker – Template requests & Changes. Procurement Manual.
  - Sandy Clavet – Procurement & Policy Analyst (SP & Delegations).
- 2 Pilots – Reverse Auction & 30% cost weighting
  - 3 RA’s completed:
    - ODOT – Glass Beads & Road Paints (mixed results)
    - ODOT – Fuel Tank Cleaning (cost reduction)
    - DOC – Mayo, Oil & Margarine (cost reduction -6%)
      - Need to do 7 more – only have 5 ½ - 6 identified. DAS needs more to complete the pilot.
      - If you have any procurements in your agency that is over \$150,000.00 please contact Amy Velez.
  - 30% cost weighting – Please be sure to have your staff report the weighting.  
<https://www.oregon.gov/das/procurement/pages/sb1565.aspx>
    - DOC has reported 1
    - ODOT has reported 1
    - OHA/DHS has reported 3
- Executive Team Retreat-
  - Big agency projects are coming this biennium – if assistance is needed please contact DAS PS.
- Prospective property to purchase located in Wilsonville.
  - Previously a Microsoft property.
  - Details about Wilsonville site to come.
- Potentially doing a rewrite of the COBID EO.
  - Rewrite & reissue COBID EO.
  - Wording changes to add clarity to identify who is responsible for what reporting.
  - Will provide guidelines, processes, training and tools for implementation.
  - More to come in the next few months.
- Partners in Public Procurement 2020
  - March 3 & 4, 2020
  - Will be an awards program – please be thinking who would you like to nominate for any of the subjects.

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	○ Draft Program attached.
<b>DPO Council Charter biennial review – Sharon Domaschofsky (OSP – Chair)</b>	
	<ul style="list-style-type: none"> <li>• No changes at this time</li> <li>• If anyone has changes please send suggestions to Jordan Sim (<a href="mailto:jordan.sim@oregon.gov">jordan.sim@oregon.gov</a>)</li> </ul>
<b>Roundtable</b>	
	<p><b>PERS</b> – PSC3 open (underfill available)</p> <p><b>DOJ</b> – Request from SOS to register on OregonBuys; a bit confusing, should it be procurement or should it be finance? Agency needed to be registered as a vendor.</p> <p><b>Business Oregon</b> – PCS3 open (interviews tomorrow 8/29).</p> <p><b>Employment</b> – PCS3 open and PCS3 rotation (underfill available – potential to transition to permanent) on the street 9/5.</p> <p><b>ODF&amp;W</b> – OPPA:</p> <ul style="list-style-type: none"> <li>- Won the 2019 NIGP “Excellence in Education and Profession; all Development”</li> <li>- Diane Murzynski, CPPO, CPPB (City of Albany) won the 2019 NIGP “Buyer of the Year award”.</li> <li>- Columbia Chapter won the 2019 NIGP “Medium Chapter of the Year award”.</li> </ul> <p><b>DAS</b> – PCS3 open, PCS3 on IT, SPA on IT.</p> <p><b>DAS Training</b> –</p> <ul style="list-style-type: none"> <li>• Updates to OpBok, training development for 2020 – will bring to DPOs for input,</li> <li>• Roadshow 5 classes in Medford,</li> <li>• Fundamentals of Procurement will be taken on the road (15 or more people – will come to you),</li> <li>• Intermediate Certification is now active.</li> </ul>
3:25	Close of Meeting

**Next Meeting:**

**Date:** September 25, 2019

**Time:** 1:30 - 3:30 pm

**Location:** ODF – 2600 State Street SE (Tillamook Conference Room)