 Office of Emergency Management POLICY		POLICY NUMBER: ADM 801
Approved By: Andrew Phelps, Director of the Office of Emergency Management		Effective Date: June 11, 2020
Version: 002	CPE Workstation Allocation Policy	

I. PURPOSE:

The Oregon Office of Emergency Management, 9-1-1 Program (OEM) is to provide funding reimbursement from the 9-1-1 Subaccount for CPE Workstations for all Public Safety Answering Points (PSAP) in the state of Oregon.

“The Office provides all funds requested by 9-1-1 jurisdictions under ORS 403.240 for costs incurred for emergency communications services on a reimbursement basis. A request for reimbursement must be for costs incurred for products and services provided to the 9-1-1 jurisdiction in the previous calendar quarter or, for database development, network and on-premises equipment that satisfies the requirements of ORS 403.115(2) and (4), for costs incurred prior to the preceding calendar quarter. The Office may not provide reimbursement for goods or services not provided to the 9-1-1 jurisdiction.”

“Payment or reimbursement for CPE for a primary PSAP that is customer-owned and maintained is subject to the Office’s review and approval; 104-080-0200 Authorized Expenditures from the 9-1-1 Subaccount.”

2. SCOPE:

This CPE Workstation Allocation Policy is applicable for reimbursement for all primary PSAP's within the State of Oregon based upon a formula that ensures a consistent and predictable statewide allocation of workstations.

3. Authorities / Reference:

OEM's funding authority under this Policy is subject to:

- ORS 403.115 (2) and (4) 9-1-1 as Primary Emergency Number
- ORS 403.235 Emergency Communications Account
- ORS 403.240 Distribution of account proceeds; uses; reimbursement request Review; reports

Rules concerning the funding of CPE Workstation(s) can be found in Oregon Administrative Rules, Division 80 (9-1-1 Emergency Communications System Program), specifically:

- OAR 104-080-0160 (2)(c)
- OAR 104-080-0180
- OAR 104-080-0190
- OAR 104-080-0195
- OAR 104-080-0200

4. POLICY BODY:

This Policy provides a consistent and predictable methodology for determining the allocation statewide of CPE at a primary PSAP based on an Erlang C Formula which is a mathematical equation for calculating the minimum number of workstations being utilized at maximum efficiency in a call center based upon the call volume, duration and wait time for callers.

In addition, this Policy delineates the administrative requirements necessary before funds may be distributed. OEM's funding authority under this Policy are subject to the provisions of ORS 403.235 to 403.240 and OAR 104-080-0190; OAR 104-080-0200 and conditioned upon OEM receiving funds, appropriations, limitations, allotments, or other expenditure authority sufficient to allow OEM, in the exercise of its reasonable administrative discretion, to meet its authority within this Policy.

A. Workstation Allocation Methodology

The Office uses, in part, Erlang C formula for the basis of workstation allocation where;

- Call volume is based upon the average of the ten highest busy hours each month, over the previous 18-month period from March to September,
 - The difference between the first and second busy hour, listed above, for each busiest month cannot exceed ten percent
 - If it does exceed ten percent, the second busiest hour that month will be utilized.
- Call volume results will be doubled to account for abandoned calls
- Call duration is the average monthly time used for call processing
- An average delay of ten seconds to answer
- Sixty seconds will be added to the average monthly call processing time to account for call transfers, referrals and wrap-up time
- Inputs for busy hour and call duration will be obtained from the Statewide Enterprise Management Information System application
- In addition to the Erlang C based formula listed above, one supervisor workstation will be added for every eight eligible workstations.

B. Allocation Review Considerations

At any time, a primary PSAP may request additional workstations beyond current allocation levels provided under Section A of this policy. Workstation Variance Request Form (104-080-0210F2) shall be used for making formal requests to the State 9-1-1 Program for review and consideration.

In addition to submission of the Workstation Variance Request Form, all requests will be evaluated on the following where;

- OEM will utilize highest busy hour and/or call duration allocation methodology results from any March to September prior 18 month performance period, whichever returns the greatest value.

5. Reimbursement

The Office uses funds in the 9-1-1 Subaccount to reimburse the eligible costs on behalf of the 9-1-1 jurisdiction. The Office shall reimburse a 9-1-1 jurisdiction only if that 9-1-1 jurisdiction has an approved 9-1-1 Jurisdiction Plan on file with the Office that describes the capital and recurring costs of the 9-1-1 jurisdiction. The Office reviews each submission for reimbursement for appropriateness of the payment, including a review of the reasonableness of costs for products and services provided. A request for reimbursement must be for costs incurred for products and services provided to the 9-1-1 jurisdiction in the previous calendar quarter or, for database development, network and on-premises equipment that satisfies the requirements of ORS 403.115(2) and (4), for costs incurred prior to the preceding calendar quarter. A request for reimbursement must be made using OEM Form 104-080-0200F (See **Appendix A**) and is subject to Office review for completeness, accuracy, and applicability. Failure to meet prerequisites or submit requests for payment or reimbursement in the manner required by the Office may result in delay or denial of payment. All requests for reimbursement must be for hardware received, services rendered, or both. OEM may not provide reimbursement for hardware or services to be provided at a future date.

A 9-1-1 jurisdiction may acquire CPE through the incumbent local exchange carrier or, in the alternative, the 9-1-1 jurisdiction may acquire CPE through any other provider providing the CPE meets the standards set by the Office. A helpful Procurement Planning Reference Guide is provided (See **Appendix B**) to assist 9-1-1 Jurisdiction with procurement planning considerations.

Reimbursement will be evaluated based upon the following criteria:

1. Verification of 9-1-1 jurisdiction compliance with all applicable federal, state and local laws, including, but not limited to, the Oregon Public Contracting Code.
2. Verification of eligibility/reimbursement CPE product, service and service levels against state standard as defined in OAR 10-080.
 - *if* all products, services and service levels requested by the PSAP align with state standards – State 9-1-1 Program will issue an approved Not-to-Exceed (NTE) to the requesting 9-1-1 Jurisdiction
 - *if* some or all products, services and service levels request by the PSAP do not meet State 9-1-1 Program minimums – State 9-1-1 Program will work with the requesting 9-1-1 Jurisdiction to ensure minimums are met and an approved NTE is reached
 - *if* ineligible (non-reimbursable) products and/or services have been identified or the associated service levels exceeded State 9-1-1 Program standards, the State 9-1-1 Program will work with the 9-1-1 Jurisdiction to identify areas requiring adjustment and any re-quoting if necessary. In addition, any products, services or increased service level above the state standards will be the responsibility of the requesting 9-1-1 Jurisdiction and any ineligible products and/or services will be required to be quoted separately.
3. NTE funding level will be determined through the evaluation of the results of the procurement process and requirements.

6. Revision History:

Version Number	Date Approved	Approved By	Brief Description
001	2018-11-21	Andrew Phelps, Director of the Office of Emergency Management	Original Document
002	2020-6-11	Andrew Phelps, Director of the Office of Emergency Management	Added section B – Allocation Review Considerations

7. ATTACHMENTS:

- A. Appendix A – Payment Authorization Form OEM 104-080-0200F
- B. Appendix B – PSAP CPE Procurement Planning Reference Guide

Andrew J. Phelps

Director

APPENDIX A

Payment Authorization Form

OEM 104-080-0200F

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State of Oregon, Office of Emergency Management (9-1-1 Program)	
Payment Authorization Form	Email form to: 911.billing@mil.state.or.us
OEM-104-080-0200F	Mail form to: Office of Emergency Management, 9-1-1 Program P.O. Box 14370 Salem, Oregon 97309-5062

Requesting 9-1-1 Jurisdiction:

Address: _____

City, State, Zip: _____

PSAP Manager: _____

E-mail Address: _____

Phone Number: _____

Fax Number: _____

Type of Reimbursement Claim:

() CPE Equipment () 9-1-1 Education

() Maintenance () OTHER

() Text-to-9-1-1 () EXPLAIN

Request for Direct Pay: () Yes () No

If yes explain: _____

Direct Pay Name and Address:

Vendor: _____

Address: _____

City, State, Zip: _____

Description of equipment and services being submitted for payment or reimbursement:

For each item listed below, the 9-1-1 Jurisdiction shall attach proof of payment, detailed invoices, descriptions and quantities of services performed which validates payment or reimbursement quantities and amounts. When applicable, the 9-1-1 Jurisdiction shall include on items requested for payment or reimbursement along with the pre-approved documentation as required by Oregon OAR 104-080-0200.

Description	Total #	Time Period of Claim	Total Cost Per Item	Amount Approved (9-1-1 Use only)
CLAIM TOTAL				

I certify that this 9-1-1 Jurisdiction has complied with all applicable federal, state and local laws, including, but not limited to, the Oregon Public Contracting Code.

AUTHORIZED TO SIGN FOR PUBLIC AGENCY	Name: _____	Title: _____
	Signature: _____	Date: _____

State 9-1-1 Office Use Only

RECOMMENDED FOR APPROVAL BY	Telephone Number	Amount	APPROVED BY	Date

DENIED BY: _____ **Date** _____

REASON: _____

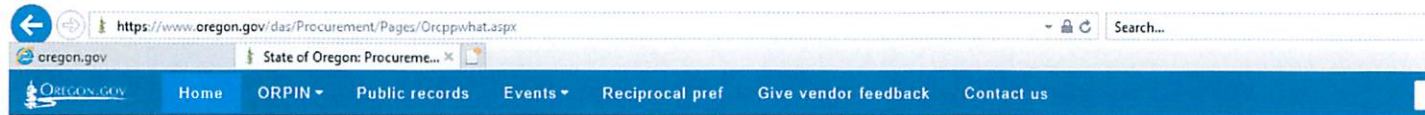


PSAP CPE Procurement Planning Reference Guide

October 16, 2018 – v1.0

Need procurement assistance or training?

Oregon Cooperative Procurement Program (ORCPP)
<https://www.oregon.gov/das/Procurement/Pages/Orcppwhat.aspx>



About ORCPP

- SERVICES WE PROVIDE
- SERVICE LEVEL AGREEMENT
- FORMS, TEMPLATES & GUIDELINES
- ORCPP
- OREGON PROCUREMENT MANUAL
- ORPIN
- QRF
- TRAINING
- TRAVEL

Oregon Cooperative Procurement Program (ORCPP) uses an intergovernmental agreement with its partnering entities to provide its members with access to the following resources:

- Over 340 statewide price agreements to purchase goods and services
- Unlimited advertising in the Oregon Procurement Information Network (**ORPIN**)
- Thousands of archived solicitations in ORPIN, to help you build new solicitations
- Training opportunities through DAS
- **State of Washington Contracts** - Entities must determine whether these contracts meet their own purchasing rules and ORS 279 requirements.
- **ORCPP Link** - Our program managers keep you connected with emails concerning trainings, updates to price agreements, specials from **DAS Surplus** and other resources.

For more information

E-mail: info.orcpp@oregon.gov

Program Coordinators

Kelly Stevens-Malnar
503-378-3976

Adam Helvey
503-373-2106

Who is eligible?

ORCPP eligible entities include:

- Units of local government - cities, counties, school districts, etc.
- Special districts - fire, water, vector control, health, etc.
- Oregon university and community colleges
- Qualified rehabilitation facilities
- American Indian tribes and agencies of American Indian tribes
- Certain qualifying, public benefit corporations
- State agencies not subject to **ORS 279A.050** and DAS-implemented administrative rules, such as: Oregon Lottery, Treasury, Secretary of State, etc.

How much does it cost?

Participation in the program may include an annual fee based on your total organizational budget.

[View the fee chart](#)



Thinking about a phone system upgrade?



Have you maximized the life of the system you have today?



Does your CPE manufacturer offer a 6th year of software support & maintenance?

Yes



Extend hardware and software maintenance to maximize useful life of equipment and investment

No

PSAP
Jurisdictional
Procurement
Considerations

1. Am I required to conduct open public competitive bidding processes based upon my local and/or state procurement requirements & Public Contracting Code?
2. Does my current CPE contract contain terms and/or conditions necessary to support procuring my replacement system?
3. Does my local jurisdiction participate in a national buy program?
4. Do I need to delegate my jurisdictional procurement authority to the State of Oregon Office of Emergency Management for the purchase of my replacement system?

Scenario #1: Maximize supportable lifecycle of existing phone system CPE **(Exercise 6th year of useful lifecycle)**

- 1. PSAP review existing contract products, services, terms and conditions**
- 2. PSAP verify existing product and services eligibility with State 9-1-1 Program**
 - Provide copy of CPE master contract and initial products and services quote (Contact 911.billing@state.or.us)
 - State 9-1-1 Program will coordinate eligibility review session based upon CPE standards jointly with the requesting PSAP
 - If needed, PSAP will obtain revised quote for products and services
 - State 9-1-1 Program will provide not-to exceed approval for pre-payment authorization based upon product and service eligibility. *(note: Any products or services beyond CPE standards as defined within Administrative Rule 104.080.0200 will be the responsibility of the requesting PSAP. For example, this includes additional workstations deemed not eligible under the Oregon Erlang formula, increased vendor support or maintenance requirements and any additional capacity necessary to support PSAP funded requirements.)*
- 3. PSAP execute contract extension for 6th year**
 - PSAP is customer of record - invoices sent to PSAP for review and confirmation of products/services received
 - PSAP submit State 9-1-1 Program Payment Authorization Request Form for all one-time annual payments identifying the desire for reimbursement or direct vendor payment.
 - Any subsequent contract amendments beyond initial NTE require State 9-1-1 eligibility review and is subject to verification process as outline within step #2.

Scenario #2: PSAP Managed Procurement – Amend existing CPE contract

1. PSAP to determine if existing contract terms and conditions support procurement of a replacement system
2. PSAP negotiate scope of desired products and services based on existing contract provisions
3. PSAP to develop funding and pre-payment authorization needs/requirements
4. Provide copy of procurement, proposed contract and payment authorization needs/plans (Contact 911.billing@state.or.us)
 - State 9-1-1 Program will coordinate eligibility review session based upon CPE standards jointly with the requesting PSAP
 - State 9-1-1 Program will provide not-to exceed approval for pre-payment authorization based upon product and service eligibility. *(note: Any products or services beyond CPE standards as defined within Administrative Rule 104.080.0200 will be the responsibility of the requesting PSAP. For example, this includes additional workstations deemed ineligible under the Oregon Erlang formula, increased vendor support or maintenance requirements and any additional capacity necessary to support PSAP funded requirements.)*
5. PSAP to execute new contract
 - PSAP is customer of record - invoices sent to PSAP for review and confirmation of products/services received
 - PSAP submit State 9-1-1 Program Payment Authorization Request Forms for all one-time and annual payments associated with the system replacement as agreed upon by prior NTE approval while identifying the desire for reimbursement or direct vendor payment.
 - Any subsequent contract amendments beyond initial NTE require State 9-1-1 eligibility review and is subject to verification process as outline within step #4.

Scenario #3: PSAP Managed Procurement – National Buy Program Membership/Participation

- 1. PSAP to determine existing national buy program participation or need for new membership**
- 2. PSAP contact participating providers, obtain quotes for desired products and services**
- 3. PSAP to develop funding and pre-payment authorization needs/requirements**
- 4. PSAP has the option to verify existing product and services eligibility with State 9-1-1 Program**
 - Provide copy of procurement, proposed contract and payment authorization needs/plans (Contact 911.billing@state.or.us)
 - State 9-1-1 Program will coordinate eligibility review session based upon CPE standards jointly with the requesting PSAP
 - State 9-1-1 Program will provide not-to exceed approval for pre-payment authorization based upon product and service eligibility. *(note: Any products or services beyond CPE standards as defined within Administrative Rule 104.080.0200 will be the responsibility of the requesting PSAP. For example, this includes additional workstations deemed ineligible under the Oregon Erlang formula, increased vendor support or maintenance requirements and any additional capacity necessary to support PSAP funded requirements.)*
- 5. PSAP to execute new contract**
 - PSAP is customer of record - invoices sent to PSAP for review and confirmation of products/services received
 - PSAP submit State 9-1-1 Program Payment Authorization Request Forms for all one-time and annual payments associated with the system replacement or as agreed upon by prior NTE approval while identifying the desire for reimbursement or direct vendor payment.
 - Any subsequent contract amendments beyond initial NTE require State 9-1-1 eligibility review and is subject to verification process as outline within step #4.

Scenario #4: PSAP Managed Procurement – Conduct Local RFP

1. PSAP to provide open competitive solicitation for CPE services and supplies
2. PSAP to review competitive bids
3. PSAP has the option to review vendor bids and services eligibility with State 9-1-1 Program
 - Engage State 9-1-1 Program on bid review process and payment authorization needs/plans (Contact 911.billing@state.or.us)
 - State 9-1-1 Program will participate in eligibility review session based upon CPE standards jointly with the requesting PSAP
 - State 9-1-1 Program will provide not-to exceed approval for pre-payment authorization based upon product and service eligibility. *(note: Any products or services beyond CPE standards as defined within Administrative Rule 104.080.0200 will be the responsibility of the requesting PSAP. For example, this includes additional workstations deemed ineligible under the Oregon Erlang formula, increased vendor support or maintenance requirements and any additional capacity necessary to support PSAP funded requirements.)*
4. PSAP to execute new contract
 - PSAP is customer of record - invoices sent to PSAP for review and confirmation of products/services received
 - PSAP submit State 9-1-1 Program Payment Authorization Request Forms for all one-time and annual payments associated with the system replacement or as agreed upon by prior NTE approval while identifying the desire for reimbursement or direct vendor payment.
 - Any subsequent contract amendments beyond initial NTE require State 9-1-1 eligibility review and is subject to verification process as outlined within step #3.

Scenario #5: PSAP Requests Delegated Authority to the Office of Emergency Management to Conduct Procurement for the PSAP

- 1. Authority responsible for PSAP jurisdiction to submit a request in writing to the Office of Emergency Management, State 9-1-1 Program Manager requesting the desire to delegate procurement authority**
- 2. OEM to provide intergovernmental agreement for delegation of jurisdictional authority**
- 3. PSAP to develop funding and pre-payment authorization plans and requirements**
- 4. State 9-1-1 Program will scope and conduct procurement based upon program product and service eligibility**
- 5. PSAP has the option to verify existing product and services eligibility with State 9-1-1 Program**
- 6. State 9-1-1 Program will procure products and services**
- 7. State 9-1-1 Program will provide not-to exceed approval based upon scope of eligible products or services**
- 8. PSAP to execute new contract**
 - PSAP is customer of record - invoices sent to PSAP for review and confirmation of products/services received
 - PSAP submit State 9-1-1 Program Payment Authorization Request Forms for all one-time and annual payments associated with the system replacement as agreed upon by prior NTE approval while identifying the desire for reimbursement or direct vendor payment.

Additional Information:

OEM, State 9-1-1 Program Contact:

Frank Kuchta, State 9-1-1 Program Manager

frank.kuchta@state.or.us

503-378-4620