Welcome!

Gretchen Adkins, CPPO
Chief Procurement Officer
Administrative Services
Office of Procurement Services

APO Meeting - September 12, 2014

- Procurement Focus Group
- Customer Service Survey
- OAKS 9.2 Upgrade
- Ohio Marketplace eCatalog Update
- MBE Work Zone – Opportunity Ahead
- MBE Sub-Contracting & Reporting
- Community Rehabilitation Program (CRP)
- Questions/Solutions Discussion
## Procurement Focus Group

<table>
<thead>
<tr>
<th>Intro</th>
<th><strong>Christian Selch</strong>, Administrative Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>Focus Group</td>
<td><strong>Alana Haberman</strong>, Transportation</td>
</tr>
<tr>
<td>Training</td>
<td><strong>Paul Maragos</strong>, Health</td>
</tr>
<tr>
<td>Templates</td>
<td><strong>Tim Schultz</strong>, Veterans Services</td>
</tr>
<tr>
<td>Thresholds</td>
<td><strong>Kelly Sanders</strong>, Rehabilitation &amp; Correction</td>
</tr>
<tr>
<td>Portal</td>
<td><strong>Steve Hrinko</strong>, Youth Services</td>
</tr>
</tbody>
</table>

*APO Meeting - September 12, 2014*
Customer Service Survey

Wayne McCulty, CPPO
Administrator
Administrative Services
Office of Procurement Services
Customer Service Survey

Subject: ODAS Office of Procurement Services (OPS) Performance Survey Bid/Contract #

Hello!

The Office of Procurement Services (OPS) requests your feedback on the recent solicitation issued for your agency.

Will you please take this very short survey to let us know how we are doing? Your input will assist the Office of Procurement Services to better serve you and other state agencies.

Best Regards
# Customer Service Survey

## ODAS Office of Procurement Services (OPS) Survey

1. **What is the Bid / Contract Number?**

2. **How well did OPS meet the product and/or service needs of your agency on this procurement process?**

<table>
<thead>
<tr>
<th>Excellent</th>
<th>Very Good</th>
<th>Satisfactory</th>
<th>Unsatisfactory</th>
<th>Poor</th>
</tr>
</thead>
<tbody>
<tr>
<td>√</td>
<td></td>
<td></td>
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</tbody>
</table>

   **Met Agency Needs**

3. **How well did OPS execute the solicitation in a timely manner?**

<table>
<thead>
<tr>
<th>Excellent</th>
<th>Very Good</th>
<th>Satisfactory</th>
<th>Unsatisfactory</th>
<th>Poor</th>
</tr>
</thead>
<tbody>
<tr>
<td>√</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

   **Timeliness**

4. **How well did OPS provide courteous, professional and responsive communications?**

<table>
<thead>
<tr>
<th>Excellent</th>
<th>Very Good</th>
<th>Satisfactory</th>
<th>Unsatisfactory</th>
<th>Poor</th>
</tr>
</thead>
<tbody>
<tr>
<td>√</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

   **Professionalism**
## Customer Service Survey

5. How well did OPS collaborate with your agency in the development process?

<table>
<thead>
<tr>
<th>Excellent</th>
<th>Very Good</th>
<th>Satisfactory</th>
<th>Unsatisfactory</th>
<th>Poor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collaboration</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

6. How well did OPS perform in this solicitation as compared to previous solicitations for your agency?

<table>
<thead>
<tr>
<th>Excellent</th>
<th>Very Good</th>
<th>Satisfactory</th>
<th>Unsatisfactory</th>
<th>Poor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Improvement</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

7. Do you have any comments, questions, or concerns?
(If a response is requested, please include your contact information.)

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OAKS 9.2 Upgrade

Remard Colston

OAKS PMO Lead

Administrative Services

APO Meeting - September 12, 2014
Topics

- Project Overview
- Scope
- New Features
Project Overview

Background
- Current system was implemented in 2008
- Oracle only offers “sustaining support”, not a current release
- Some legacy processes were built into the system
- New features in PeopleSoft 9.2 can reduce the need for customized processes
- Technology has improved for better performance

Benefits
- Increase vendor support
- Leverage standard practices and 9.2 functionality to streamline business processes
- Reduce total cost of ownership
- Expand supplier self-service
- Simplify the technology landscape
- Implement platform for future strategic initiatives
Upgrade Scope

- **Upgrade existing modules from version 8.8 to 9.2:**
  - General Ledger
  - Asset Management
  - Accounts Receivables
  - Billing
  - Accounts Payable
  - Travel & Expense
  - eProcurement
  - Purchasing
  - Strategic Sourcing
  - eSupplier
  - Commitment Control

- **Implement new modules**
  - eSettlements
  - Supplier Onboarding Portal
Upgrade Scope

- Optimize processes and reduce customizations:
  - **Procure-to-Pay**
    - Review and Optimize Blanket Purchase Orders
    - Electronic Purchase Order Dispatch
    - Enable Procurement Card
    - Payables Process Optimization
    - Payment Terms Default
    - Supplier Enablement
    - Procurement Workflow Email Management Collaboration (EMC)
  - **Order-to-Cash**
    - ISTV Customization
  - **Record-to-Report**
    - HCM / FIN Payroll Process
    - Agency Ability to Budget Check
Upgrade Scope

- **Cross-Process Areas**
  - Enable Delivered Group Approvals
  - Work Centers and Dashboards
  - Security Optimization
  - Optimize FIN Job Plan

- **Integration Solution**
  - Delivered Integrations
  - Delivered Service-Oriented Architecture (SOA) Enabled Features
PeopleSoft 9.2 - Key Enterprise Enhancements

- Electronic Forms
- Approval Framework Improvements & Extensions
- Attachments
- WorkCenters
- Pivot Grids
- Mobile Applications
- Supplier Onboarding & Collaboration
Electronic Forms

- Forms & Approval Builder aims to eliminate paper and email based forms
  - Replace with auditable, electronically approvable, and immediately accessible forms and form data
- The tool is a PeopleSoft common component
  - Offer the ability to specify an unlimited number of various field types to appear on a form;
  - define instructions, attachments, and approval routing paths for forms
  - Map the form fields to PeopleSoft Component Interface so that the form can feed data into a PeopleSoft transaction
Approval Framework and Attachments

Approval Framework Improvements
- Ability to add an ad-hoc approver during the approval cycle.
- Ability to add comments and attachments to a transaction during the approval cycle.
- Extend the approval framework to support Commitment Control Budget Journals.
- Extend the approval framework to support specific Treasury & Asset Management flows.

Attachments
- Attachment capabilities extended throughout
  - Expenses
  - Receivables
  - eBill Payment
  - Payables
  - Asset Management
  - Treasury
**WorkCenters**

- Goal of the WorkCenter is to consolidate and centralize access to relevant data and allow the organization to provide the tasks that must be completed by users.

- **FSCM 9.2 WorkCenters** will deliver four standard pagelets -
  - My Work
  - My Links
  - Queries
  - Reports and Processes

- FSCM WorkCenters are planned to be preconfigured by user role.

- Functional administrators will decide the level of information and end-user capabilities that they want to enable for their end users.

- Personalize the content at a user, role, or permission list level.

- PeopleSoft FSCM 9.2 includes WorkCenters for these applications:
  - Payables, Billing, Receivables, General Ledger, Supplier Administration, and SRM Buyer Administration.
Pivot Grids

- Pivot Grids were introduced in PeopleTools 8.52 to provide self-service, interactive analytical grids and charts for users to segment and filter data based on PS Queries and can display results in grid and/or chart format.
Mobile Applications

- PeopleSoft delivers the following mobile applications for access from mobile devices:
  - PeopleSoft Mobile Approvals
  - PeopleSoft Mobile Expenses
  - PeopleSoft iPad Certification
  - Safari browser for iPad on v4.2 or later
Supplier Self-Service

- Supplier Information: Includes several enhancements to manage supplier information more effectively, such as User definable fields on the vendor master, the new vendor address lookup, the new ability to define any ordering vendor location, and Vendor Contacts, which now retrieves the address, phone, and fax numbers from the vendor address information.

Currently out of scope
Contact Information

For questions related to the FIN Upgrade project please use the following contact information:

Remard Colston
remard.colston@das.ohio.gov
614-387-0791
Ohio Marketplace eCatalog Update

Jean Stephenson, CPPO, C.P.M., A.P.P.
State Procurement Contracts Manager
Business Lead, Ohio Marketplace eCatalog
• Catalog enablement
• How to search for OMP contracts
• Agency onboarding
• Training
• New OMP web page
Catalog enablement...

- 112 catalogs currently enabled in OMP
- 110+ scheduled through March of 2015

<table>
<thead>
<tr>
<th>ID</th>
<th>Push Description</th>
<th>Start</th>
<th>Finish</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>MBE Catalogs Part 1</td>
<td>4/14/2014</td>
<td>6/23/2014</td>
</tr>
<tr>
<td>3</td>
<td>Complete categories that have been partially enabled</td>
<td>8/27/2014</td>
<td>12/26/2014</td>
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<tr>
<td>4</td>
<td>STS enablement</td>
<td>12/29/2014</td>
<td>2/9/2015</td>
</tr>
<tr>
<td>5</td>
<td>Required state resources</td>
<td>2/10/2015</td>
<td>3/9/2015</td>
</tr>
</tbody>
</table>
How to search for OMP contracts...

www.Ohio.gov/procure

Click Current Contracts
Select “Contracts Available in the Ohio Marketplace”
Determine your search criteria and click “Search”
Select the contract hyperlink
Agency onboarding...

**Our newest active OMP agencies:**

- Dept. of Aging
- Public Utilities Commission
- Bureau of Worker’s Compensation
Agency onboarding...

<table>
<thead>
<tr>
<th>Ohio Marketplace Agency Onboarding Timeline</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY 15 Q1</td>
</tr>
<tr>
<td>----------</td>
</tr>
<tr>
<td><strong>Wave 2</strong></td>
</tr>
<tr>
<td><strong>Wave 3</strong></td>
</tr>
<tr>
<td><strong>Wave 4</strong></td>
</tr>
<tr>
<td><strong>Wave 5</strong></td>
</tr>
</tbody>
</table>

Draft 8-19-14  
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Training...

Web-based and Instructor-led training is available!

For a full listing of available classes, navigate to: myOhio.gov > Career Resources > All Learning > Search ELM Catalog > keyword: Marketplace

- OMP 200 (ILT) classes scheduled weekly through December
- Shoppers can now assign carts to other users with the Shopper role
- Multiple vendors can be included in a single cart to create multiple purchase orders
- Updated screen shots for requisitioner and shopper role in the OMP 200 WBT
- Re-recorded OMP 100 WBT to reflect recent changes
New OMP web page...

**Launched June 2014!**

Find it on the State Procurement website @ [ohio.gov/procure](http://ohio.gov/procure)

Public-facing informational web page:

- What is the Ohio Marketplace eCatalog and eInvoice?
  - Resources
  - Policies
  - Contracts currently enabled
  - Agency rollout schedule
- Benefits of use
- Next steps
- Who to contact
New OMP web page...

Public-facing informational web page:

- What is the Ohio Marketplace eCatalog and eInvoice?
  - Resources
  - Policies
  - Contracts currently enabled
  - Agency rollout schedule

- Benefits of use
- Next steps
- Who to contact
OMP eInvoicing Project Update

Kornia Thomas
Office of Budget and Management

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QUESTIONS?
Today’s Topics…

- DAS/Office of Procurement Services FY15 MBE Set-Aside Plan
- The Request to Purchase (RTP) Form
- Overcoming Obstacles
- MBE Sourcing Efforts At-a-Glance
# FY15 MBE set aside Plan

<table>
<thead>
<tr>
<th>Index #</th>
<th>Description</th>
<th>Proposed Market</th>
<th>Projected Bid Posting Date</th>
<th>Bid Method</th>
<th>Projected Contract Value</th>
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<tbody>
<tr>
<td>DMR023</td>
<td>Professional Laundry Service for Northwest Developmental Center</td>
<td>MBE</td>
<td>9.12.2014</td>
<td>ITB</td>
<td>$270,000.00</td>
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<tr>
<td>LDC011</td>
<td>Professional Linen Rental &amp; Laundry Services</td>
<td>MBE</td>
<td>9.15.2014</td>
<td>ITB</td>
<td>$174,610.00</td>
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<td>DOH021</td>
<td>WIC Investigative Services</td>
<td>MBE</td>
<td>9.19.2014</td>
<td>ITB</td>
<td>$50,000.00</td>
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<tr>
<td>MAC019</td>
<td>Contractors to Provide Qualified, Professional Stenograph Reporting and Transcription Services - Statewide</td>
<td>MBE</td>
<td>10.1.2014</td>
<td>ITB</td>
<td>$480,000.00</td>
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<tr>
<td>NEW</td>
<td>Branding for Tobacco Program</td>
<td>MBE</td>
<td>10.1.2014</td>
<td>RFP</td>
<td>$250,000.00</td>
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<tr>
<td>NEW</td>
<td>Cribs for Kids Survival Kits</td>
<td>MBE</td>
<td>10.1.2014</td>
<td>ITB</td>
<td>$320,000.00</td>
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<td>EPA010</td>
<td>Ground Water Remediation System Maintenance</td>
<td>MBE</td>
<td>10.1.2014</td>
<td>ITB</td>
<td>$100,000.00</td>
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<tr>
<td>EXP002</td>
<td>Removal/Disposal Services for Manure, Livestock Bedding, and Yard Waste from the Ohio Expo Center</td>
<td>MBE</td>
<td>10.1.2014</td>
<td>ITB</td>
<td>$200,000.00</td>
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<tr>
<td>NEW</td>
<td>Fire System Testing</td>
<td>MBE</td>
<td>10.6.2014</td>
<td>ITB</td>
<td>$700,000.00</td>
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<tr>
<td>NEW</td>
<td>Ethics Investigator</td>
<td>MBE</td>
<td>10.6.2014</td>
<td>RFP</td>
<td>$100,000.00</td>
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<tr>
<td>NEW</td>
<td>Benchmarking and quality improvement training for CAHs.</td>
<td>MBE</td>
<td>10.6.2014</td>
<td>RFP</td>
<td>$630,000.00</td>
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<tr>
<td>NEW</td>
<td>Identify clinical care measures for benchmarking and improvement measurement for RHCs.</td>
<td>MBE</td>
<td>10.6.2014</td>
<td>RFP</td>
<td>$106,000.00</td>
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<td>NEW</td>
<td>Staff Augmentation Services</td>
<td>MBE</td>
<td>10.6.2014</td>
<td>RFP</td>
<td>$18,000,000.00</td>
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<td>NEW</td>
<td>Audit Fees (Auditor of State)</td>
<td>MBE</td>
<td>10.6.2014</td>
<td>RFP</td>
<td>$524,000.00</td>
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<td>DMH022</td>
<td>Laundry Services for Northcoast Behavioral Healthcare System, Cleveland &amp; Northfield</td>
<td>MBE</td>
<td>10.6.2014</td>
<td>ITB</td>
<td>$160,000.00</td>
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<td>DDD001</td>
<td>Housekeeping Services at Montgomery Developmental Center</td>
<td>MBE</td>
<td>10.15.2014</td>
<td>ITB</td>
<td>$310,000.00</td>
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<tr>
<td>DOT011</td>
<td>Wide Flange Steel Beams</td>
<td>MBE</td>
<td>11.1.2014</td>
<td>ITB</td>
<td>$520,000.00</td>
</tr>
</tbody>
</table>
DAS/Office of Procurement Services FY15 Plan

- State Procurement Website
  www.procure.ohio.gov

- 15% requirements for all agencies

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RTP Form: Enhancements to Section 2

Section 2 Request Information

*Provide a description of the project including supplies, services, duration, etc. that captures the general scope of the work and/or the items to be purchased.

If this request is for the purchase of used equipment, please indicate such in the description. (Specific details can be attached).

*Provide any project requirements (certifications, bonding, capital expenditures, education, project specific experience, etc.) necessary for the vendor to successfully perform the requested services.

*Included on Agency MBE Projection Plan?  ○ Yes  ○ No

If yes, please enter the line item number of where it appears on your spending plan:
Overcoming Obstacles

- Confirm that requirements are meaningful
- Remove overly excessive requirements
- Avoid the use of jargon and technical language
MBE Sourcing Efforts At-a-Glance

The Market Analysis

- Email sent to all certified Ohio MBE businesses and key stakeholders seeking capabilities and feedback
- OPS and DSA consult on final market determination (MBE Set-Aside vs. Open Market)
- Email sent to all certified MBE businesses and key stakeholders to notify them of the final determination

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QUESTIONS?
Tonya Prickett, CPPO
MBE Procurement Manager
614.466.2705
Tonya.Prickett@das.ohio.gov
Practicing MBE Set-Aside Enterprise Contracts

Todd McGonigle
EEO Program Manager
Administrative Services
Equal Opportunity Division

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MBE Set-Aside Enterprise Contracts

Director Blair Memorandum (February 4, 2014)

Procurement Option
- Does not apply to IT contracts
- Purchase is under $50,000 but part of a DAS Mandatory Enterprise Contract

Process
- Agency request to DAS
- Identify the nature of the purchase
- Identify the mandatory Contract
- Provide general description of the purchase and cost
- Provide a timeframe and explanation of the method to be used when executing the MBE purchase

Note: These purchases must be included in the agency MBE Projection Plan
MBE Set-Aside Method of Execution

- Three different ways for MBD Set-Aside credit
- Two forms
  - MBE Set-Aside Subcontracting Notification Report
  - MBE 2nd Tier MBE Subcontracting Reporting Form
MBE Set-Aside Subcontracting Notification Form

- Must have on hand for verification – Competitive process, etc.
- Due (once) by the 30\textsuperscript{th} of the month previous to the month of award
## MBE Set-Aside Subcontracting Notification Report

To be submitted to Equal Opportunity Division after contract award.

### Agency Information
Agency Name to Apply MBE Credits:
- Agency-Awarded Contract
- DAS-Awarded Contract

### Contract Information
Contract Number: 
Index Number: 
Effective Date: 
Expiration Date: 
Total Contract Value: $

### Contract Type
(select only one)
- Invitation to Bid
- Request for Proposal
- State Term Schedule (DAS only)
- Master Maintenance Agreement (DAS only)
- One-Time Award

### Type of Contract Solicitation
(select only one)
- Straight MBE Set-Aside
- New Open Market Contract w/ Embedded MBE Set-Aside
- Existing Open Market Contract w/ MBE Set-Aside Amendment

### MBE Contractor Information
(if more than one, please list information for each contractor):
- Name of MBE Contractor: 
- MBE Certification Number: 
- Amount to be Paid to MBE (can be estimated): $
- Percentage of Work to be Performed by MBE:
MBE 2nd Tier MBE Subcontracting Reporting Form

- Due monthly by 10th of the previous month being reported
- Reported via Excel Spreadsheet (electronic version coming)
- Email submission
# MBE 2nd Tier MBE Subcontracting Reporting Form

**Reporting Period - Fiscal Year** ___________ **Month** ___________

**Submission Date:** ___________

## AGENCY INFORMATION

Agency Name to Apply MBE Credits: 

Agency Awarded Contract [ ]

DAS-Awarded Contract [ ]

## Contract Information

Contract Number: ________________

Index Number: ________________

Total Contract Value: $ ________________

## Type of Solicitation (must match Contract Set-Aside Solicitation Report)

- Straight MBE Set-Aside [ ]
- Open Market Contract w/ Embedded MBE Set-Aside [ ]
- Existing Open Market Contract w/ MBE Set-Aside Amendment [ ]
- Open Market Contract w/ 2nd Tier MBE identified (Participation Credit ONLY) [ ]

## MBE Contractor Information (if more than one, please list information for each contractor):

Name of MBE Contractor: ________________________________

MBE Certification Number: ________________________________

Amount Paid this Reporting Period $ __________________

Percentage of Work to be Performed YTD: ________%

Credit Type: Set-Aside [ ] Participation [ ]

Comments: ________________________________

I certify that each subcontractor listed on this report has consented, in writing, to its name being submitted for this contract. Additionally, I certify that I shall make all documentation related to this report made available upon request to the Department of Administrative Services, Equal Opportunity Division.

I further certify that all information contained in this report is true and correct.

**PRINCIPAL OF FIRM:** ________________________________

**TITLE:** ________________________________

**DATE:** ________________________________
Three DAS MBE Set-Aside Tools

- Third Party Administered Contracts
  - CAI Contract
- STS MBE Set-Aside
- Controlling Board Approved Contracts identifies as “No Competitive Opportunity”
**EDGE Program**

- 5% requirement per fiscal year
- Applies to all purchases
- Monthly reports to governor’s office
- Month Report to agency director
- Part of Quarterly Reconciliation Meetings
- FY2014 = 4.1%
- 1640 Certified EDG Es

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Thank you

Todd McGonigle
EEO Program Manager
Administrative Services
Equal Opportunity Division
Community Rehabilitation Program

Ron Rowland, CPPO
Purchasing Manager
Administrative Services
Office of Procurement Services

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Certified CRPs

103 Certified Ohio CRPs

76 with DAS Contracts

250+ DAS Contracts

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# FY2014 Data

<table>
<thead>
<tr>
<th>Category</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Certified CRPs</td>
<td>103</td>
</tr>
<tr>
<td>Number of CRPs with Contracts</td>
<td>76</td>
</tr>
<tr>
<td>Total Contract Value</td>
<td>$33,828,616</td>
</tr>
<tr>
<td>Persons with Work-Limiting Disabilities (PW-LD)</td>
<td>2,637</td>
</tr>
<tr>
<td>Total Direct Labor Hours by PW-LD</td>
<td>1,457,278</td>
</tr>
<tr>
<td>Total Wages Paid to PW-LD</td>
<td>$13,081,639</td>
</tr>
<tr>
<td>Average Hourly Wage Paid</td>
<td>$8.98</td>
</tr>
<tr>
<td>Number of PW-LD Who Gained Experience and Transitioned to Community Employment</td>
<td>228</td>
</tr>
<tr>
<td>Number of Veterans with Disabilities that were Employed</td>
<td>38</td>
</tr>
</tbody>
</table>
ARE THERE ANY QUESTIONS OR SOLUTIONS TO DISCUSS?