

# Idaho Division of Purchasing



Quarterly Workshop

*18 November 2020*

# Workshop Agenda

*18 November 2020*

- 10:00 – 10:05 Introduction (Forrest)
- 10:05 – 10:25 Updates from the Administrator (Valerie Bollinger)
- 10:25 – 10:40 Updates from State Purchasing Manager (Chelsea Robillard)
- 10:40 – 11:00 Statewide Contract Updates (Kim Guevara, Joey Nelson, Jason Urquhart)
- 11:00 – 11:05 Contract Assignments (Maria Minicucci)
- 11:05 – 11:10 Luma Updates (Jason Skelton)
- 11:10 – 11:45 ITN Process (Kaylee Starman)
- 11:45 – 1200 Questions



# Introduction

*Forrest Benedict*



# Administrator's Update

*Valerie Bollinger*



# Objectives

**DOP Vision:** We are recognized leaders in public procurement by serving as **trusted advisors and partners**, contributing to Idaho's **strategic initiatives**, and delivering **outstanding customer service**.

## **Internal Focus:**

- Continue to build procurement expertise
- Continue to emphasize customer service
- Empower team members to seek best solutions

## **External Focus:**

- Seek input from agencies to help identify DOP priorities
- Continue to track metrics and implement strategies for improving performance
- Improve process including statewide contract program

# DOP Metrics

## PURCHASING & FEDERAL SURPLUS METRICS – OCTOBER (NEXT UPDATE DECEMBER 4)

METRIC	TARGET	STATUS	ACTUALS (MONTH-OVER-MONTH CHANGES)
Solicitation Outcome	> 90%	●	Actual: 85% (-8%)
Net Promoter Score	> 8	●	8.7 (flat)
Solicitation Cycle-time	By type		Actual performance:
• RFQ	• < 6 wks	●	• 9.6 weeks (+0.5)
• ITB	• < 14 wks	●	• 17.1 weeks (+0.1)
• RFP	• < 20 wks	●	• 37.9 weeks (-5.1)
Solicitation Satisfaction	> 8	●	7.8 (flat, no new survey results)
Training Survey Scores	> 8	●	Actual: 9.3 (-0.2)
Line Items Received	>150	●	Actual: 37 (-33)
Eligible Donees	>250	●	Actual: 261 (-3)
Donations	>200	●	Actual: 226 (-117)

- DOP currently doing a “health check” on our Metrics
- Reminder: Please take the Purchasing NPS Survey! Find the link on the “Contact Us” page of the DOP Website (Quick Links → Customer Survey) or in the signature block of any DOP email

# DOP 2020 Initiatives

DOP started 2020 with 14 Strategic Initiatives spanning 4 categories

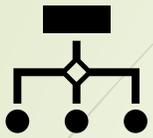
Based on various constraints, DOP re-prioritized the list to maximize value to Agencies and the DOP team

Now working on an updated list of 8 Initiatives spanning those 4 categories

# Updated DOP Initiative List

Milestone Description	Category	Assigned To	Progress	Start	Finish
<b>Talent Pipeline</b>		Chelsea			
Onboarding Process	Low Risk	Joey	95%	2/1/2020	11/25/2020
Professional Development Plans	Low Risk	Forrest	95%	9/1/2020	11/25/2020
<b>Agency Relationships</b>		Valerie			
Service Partnership Agreements	Med Risk	Valerie	5%	2/21/2020	12/20/2020
<b>Contract Leadership</b>					
Contract Admin & Management Toolkit	Low Risk	Maria	75%	2/1/2020	12/31/2020
Statewide Contract Program		Arianne	5%	9/1/2020	
<b>Drive Speed, Awareness &amp; Agility</b>		Valerie			
PMO & Process Review	Med Risk	Karen	7%	9/1/2020	6/30/2021
Purchasing Conference	Med Risk	Kaylee	5%	2/1/2020	6/30/2021
Procurement Month Celebration	On Track	Forrest	100%	1/18/2020	9/29/2020

# Amazon



- DOP is beginning the process of establishing a statewide Amazon Business account. Each agency will have the ability to set appropriate controls for its group, which will roll up into the enterprise-level account established by DOP.



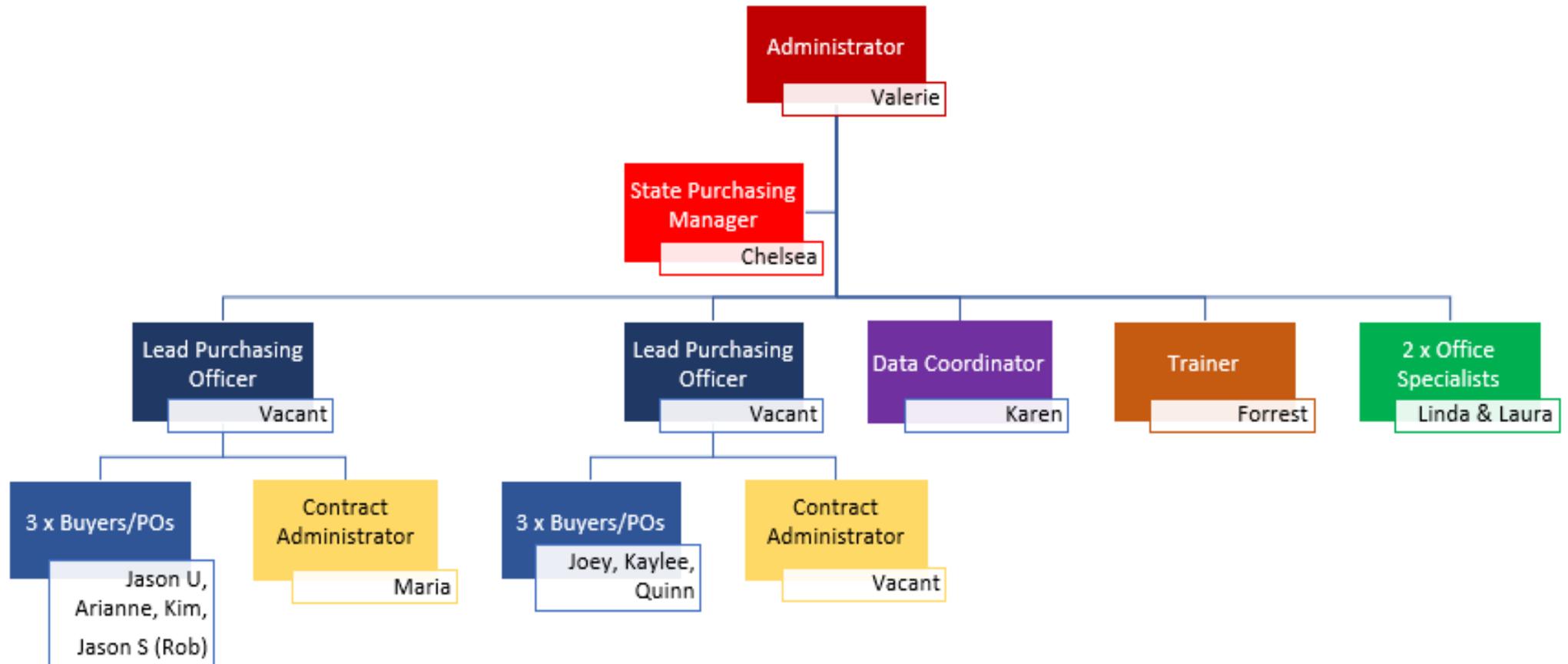
- Benefits include:

- Enterprise-wide Amazon Prime account
- Free 2-Day shipping on Prime-eligible items
- Business-specific pricing, including progressive discounts
- Access to specialized Amazon Business Customer Service team
- Access to detailed reporting

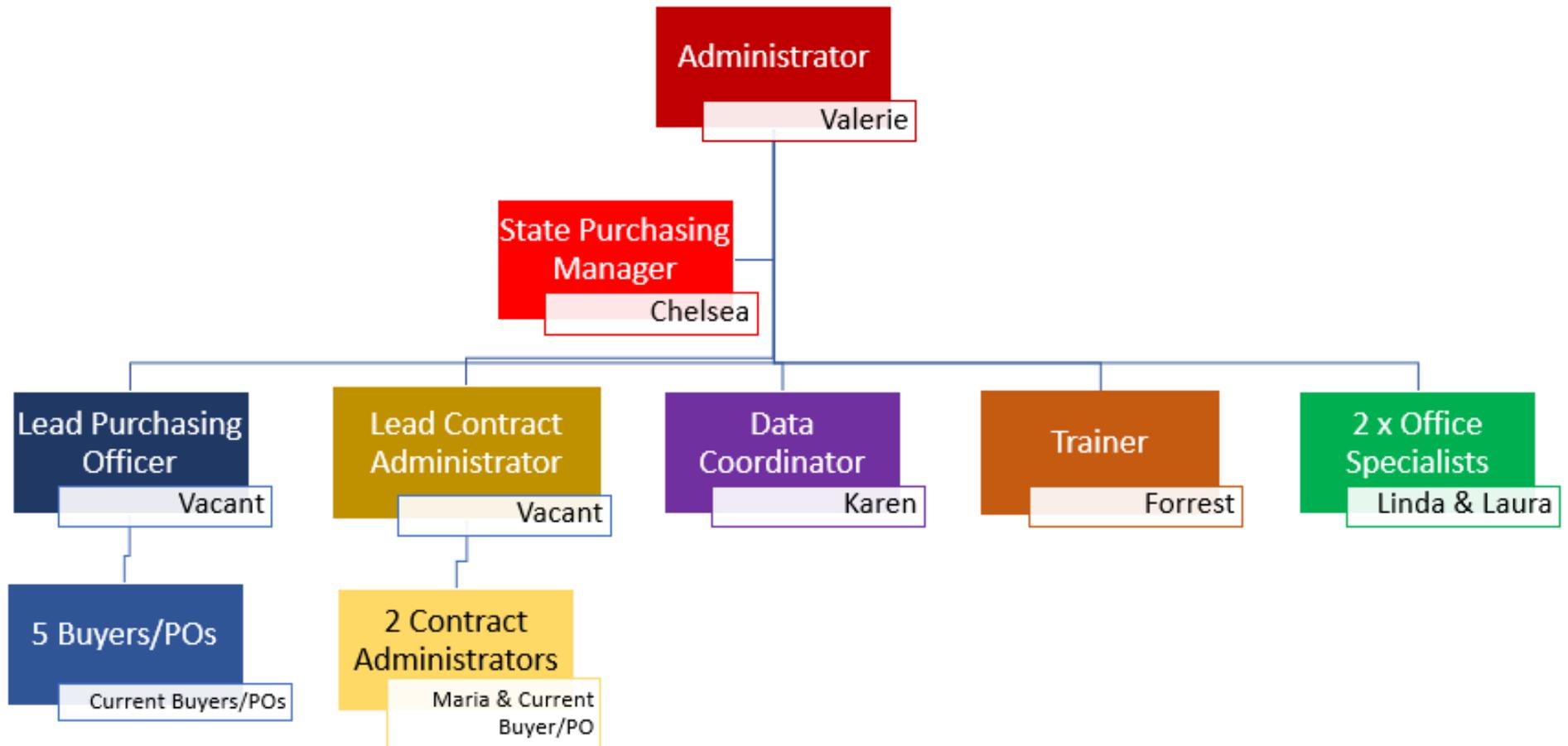


- Be on the lookout for an email regarding your Agency's participation in this program.

# DOP Restructuring



# DOP Restructuring





# State Purchasing Manager's Update

*Chelsea Robillard*





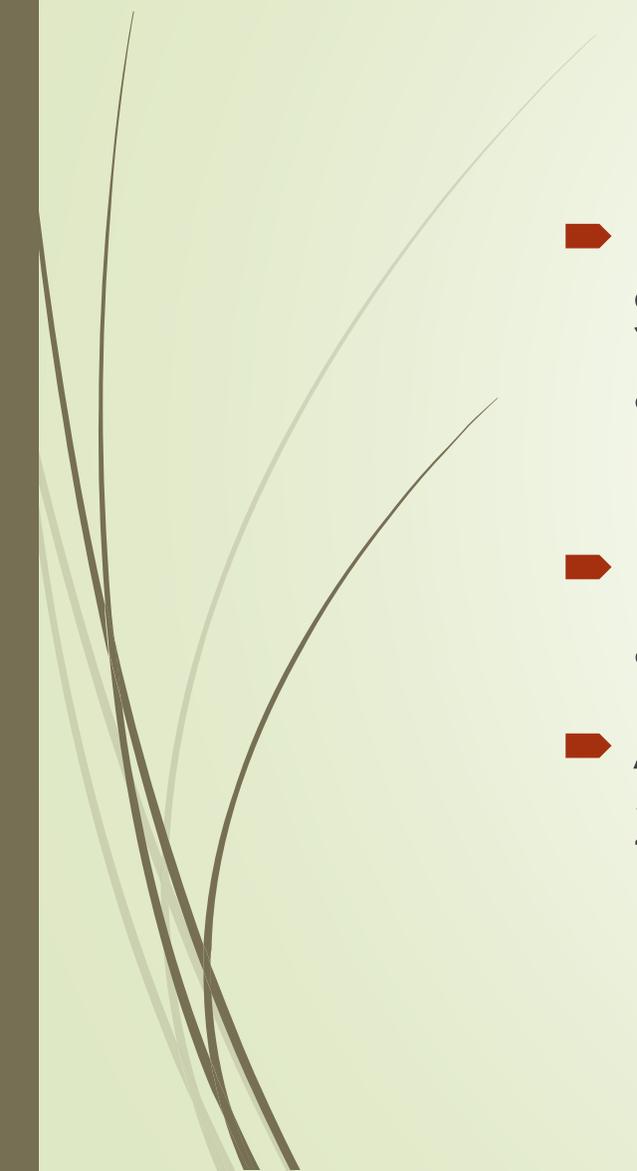
# State Purchasing Manager's Update

*Chelsea Robillard*

- 1. Staffing Update*
- 2. Upcoming statewide contract solicitations*
- 3. DPA Council Meetings*



# Staffing Update

- ▶ DOP is currently recruiting for two Program Supervisors. One position has a focus on contract administration, the other has a focus on procurement.
  - ▶ Either or both can be applied for under the same announcement.
  - ▶ Announcement closes on Sunday, November 22, 2020.
- 



# Upcoming Statewide Contract Solicitations

- ▶ Fire Extinguishers – Joey Nelson & Quinn Shea
  - ▶ Printing – Quinn Shea
  - ▶ Propane – Kaylee Starman
  - ▶ Shredding – Robert Cleve
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# Statewide Contracts Updates





# Statewide Contracts Updates

1. Kim Guevara
2. Joey Nelson
3. Jason Urquhart

# Statewide Contract Updates

*Kim Guevara*

- 1. MGS (Mask, Gloves and Sanitizer)*
- 2. Cloud Faxing Services*
- 3. Wireless Voice, Data & Accessories PADDs*
- 4. Data Comm PADDs*

# Statewide Contract Updates

*Joseph (Joey) Nelson*

- 1. Mailing Equipment*
- 2. Envelopes*
- 3. Possible Vehicles*

# Statewide Contract Updates

*Jason Urquhart*

PADD17200142-144 and 256 – Body Armor – Sourcing Team is working toward Master Agreement awards.

SBPO20200219 – CDL Alcohol & Controlled Substance Testing – we're working with the contractor to extend; may go a different direction for new contract

PADD16200941 – Data Breach & Credit Monitoring - we're working with the contractor to extend; Sourcing Team is in evaluations

PADD16200245 – Drug Testing Kits – expires 12/30/20 – will follow up on this

SBPO18200151 – Fresh Produce – expires 11/30/20 – should be awarding a new contract in next few days

# Statewide Contract Updates

*Jason Urquhart*

PADD17200277 – Software Value Added Reseller – expires 4/7/21 – will be discussing direction with ITS soon

BPO15200473 – Switched Telecommunications – expires 12/31/20; following up with contractor on our renewal letter



# Contract Assignments

*Maria Minicucci*

# Contract Assignments

What the heck is a "Contract Assignment:"?

67-9230. PROHIBITIONS. (1) No contract or any interest therein shall be transferred by the contractor to whom such contract is given to any other party without approval in writing by the administrator and by the board of examiners pursuant to section 67-1027, Idaho Code. *Transfer of a contract without approval shall cause the annulment of the contract so transferred, at the option of the state. All rights of action, however, for any breach of such contract by the contracting parties are reserved to the state.*

# Administrative Process

1. Vendor notifies DOP that it is contemplating a change in name or ownership that *includes a change in its Federal Tax Identification Number.*
2. DOP sends a packet of information and forms to the original contractor.
3. DOP analyzes information; if appropriate forwards documents to Board of Examiners (BOE) for inclusion on subcommittee meeting agenda.
4. Subcommittee provides recommendation to the full Board at its meeting one week later.
5. BOE's approval results in a contract amendment by DOP



# MEETING THE CHALLENGE

- DOP will increase its emphasize on **Assignment Requirements** in its vendor outreach, solicitations, and contracts.
- Agencies can ask their vendors at least twice a year if they are thinking about any changes to their business structure, name, or ownership. Ask them to contact DOP with information.
- The statutory onus is on the contractor. They must contact DOP before making any changes to their company.



# Luma Updates

*Jason Skelton*

# The ITN (Invitation to Negotiate) Process

*Kaylee Starman*

# Types of ITN's

- Traditional ITN
  - Is structured similar to an RFP
  - Includes a complete Scope of Work
  - Gives the ability to negotiate areas of the scope that could benefit the resulting Contract.
- Solution-Based ITN
  - Is about selecting the most qualified and experienced vendor for a particular service.
  - Gives the Agency the ability to negotiate a complete Scope of Work with the Vendor(s).
  - Includes a problem statement and any mandatory requirements the Agency has.

# When to use an ITN?

- Agile procurements (Complex IT projects)
- Complex projects that may need flexibility to negotiate and leverage Vendor's knowledge.
- New services that the state does not yet have the expertise in
- Solicitations that have been very challenging in the past
- Agency has preferred requirements but is open to alternatives depending on Vendor responses and price

# Choosing an ITN

If an Agency thinks that a project would benefit from the ITN process, there are a few things you need to do first:

- Obtain written approval from the DOP Administrator (Valerie)
  - Send an email to Valerie that requests to use an ITN as your procurement process and why your project is a good candidate for an ITN.
- Legal
  - The DAGs are highly involved in this process and need to be brought on board very early in the process.
- Collaboration
  - The ITN process takes a very collaborative effort between the Agency team, DOP, and the DAGs especially for the solution-based ITN.

# ITN Process Overview

- Agency submits sourcing request (after approval from the Administrator)
  - Questionnaire
  - Draft Scope of Work (if a Traditional ITN)
  - Draft Special T's & C's
  - DA-1 (If outside of IPRO)
- Agency & DOP Lead create the ITN
  - Timeline (DOP)
  - Evaluation Plan (Agency)
  - Legal Review (Both)

# ITN Process Overview

- Post ITN
  - Traditional ITN may have a prequalification first
- ITN Closes
- Evaluation Process
- Identify Finalists & Send out Invitation for Interviews/Demos/Presentations (optional)
- Hold Interviews/Demos/Presentations (optional)
  - Evaluators update technical scores

# ITN Process Overview

- Notification of Finalists to enter into Negotiations (Request Modifications & Exceptions from finalists as well)
- (For SB ITN) Agency creates a draft scope of work based off requirements and information provided by the finalist(s) (So we have a starting point for negotiations)
- Negotiation of Scope of Work with Finalist(s)
- Send BAFO Letter's out
  - Consists of agreement to the negotiated scope of work and their cost proposal
- Evaluate Scope of Work from Finalist(s)/ BAFO's/ Final Scoring (If there is more than one Finalist)
- LOI's/Appeal Period/Award Contract



# ITN Questions?

# Upcoming Events

9 Dec – Vendor Outreach 2020





# Open Discussion

All

HAPPY  
THANKSGIVING

