Idaho Division of Purchasing
Quarterly Workshop
19 November 2019
Workshop Agenda

- 9:00 – 9:05 Introduction (Forrest Benedict)
- 9:05 – 9:30 Administrator Update (Steve Bailey)
- 9:30 – 9:45 State Purchasing Manager Update (Valerie Bollinger)
- 9:45 – 10:00 Statewide Contract Updates (DOP Staff)
- 10:00 – 10:20 Networking Break
- 10:20 – 10:40 Luma Update (Sheena Coles)
- 10:40 – 11:15 EPAC Reporting (Danny Downen)
- 11:15 – 11:45 Cloud Update (DOP)
- 11:45 – 12:00 Open Discussion (All)
Introduction
Forrest Benedict
Administrator’s Update

Steve Bailey
Agenda

- DOP metrics status
- Customer satisfaction surveys - What are they and what we need
- 2020 Initiatives - Those that we’ve agreed to initiate by the time the workshop occurs
- New team members
- New website
- Upcoming Events:
  - IT Optimization Workshop
  - Purchasing Advisory Committee
  - State Field Training
# DOP Performance Metrics

<table>
<thead>
<tr>
<th>METRIC</th>
<th>TARGET</th>
<th>STATUS</th>
<th>COMMENTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Solicitation Outcome</td>
<td>&gt; 90%</td>
<td></td>
<td>Actual: 84% (+1)</td>
</tr>
<tr>
<td>Net Promoter Score</td>
<td>&gt; 8</td>
<td></td>
<td>9.4</td>
</tr>
<tr>
<td>Solicitation Cycle-time</td>
<td>By type</td>
<td></td>
<td>Actual performance:</td>
</tr>
<tr>
<td>• RFQ</td>
<td>&lt; 6 wks</td>
<td></td>
<td>• 5.1 weeks (-0.4)</td>
</tr>
<tr>
<td>• ITB</td>
<td>&lt; 14 wks</td>
<td></td>
<td>• 13.1 weeks (-0.8)</td>
</tr>
<tr>
<td>• RFP</td>
<td>&lt; 20 wks</td>
<td></td>
<td>• 22.1 weeks (-0.4)</td>
</tr>
<tr>
<td>Solicitation Satisfaction</td>
<td>&gt; 8</td>
<td></td>
<td>Collecting data, pilot sent by 11/29</td>
</tr>
<tr>
<td>Training Survey Scores</td>
<td>&gt; 90% @ &gt; 4</td>
<td></td>
<td>Actual: 4.3 (Flat)</td>
</tr>
<tr>
<td>Donations</td>
<td>&gt;200</td>
<td></td>
<td>Actual: 228 (update in progress)</td>
</tr>
<tr>
<td>Eligible Donors</td>
<td>&gt;250</td>
<td></td>
<td>Actual: 258 (update in progress)</td>
</tr>
<tr>
<td>Line Items Received</td>
<td>&gt;150</td>
<td></td>
<td>Actual: 143 (update in progress)</td>
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</table>
Customer Satisfaction Surveys

- Net Promoter Score

On a scale from 0-10, how likely is it that you would speak positively about your recent experience with the Idaho Division of Purchasing?

0 1 2 3 4 5 6 7 8 9 10

Please provide additional information if desired.

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Steve Bailey
Administrator
Division of Purchasing
Office: (208) 332-1612
Mobile: (986) 200-3317
DOP Main: (208) 327-7465
https://purchasing.idaho.gov/

- Spend 5-seconds telling us how we’re doing @ DOP Customer Satisfaction Survey
- Questions about Jaggaer? Email: ipro@adm.idaho.gov
- Public record requests? Email: Purchasing@adm.idaho.gov
Customer Satisfaction Surveys
Sourcing Event Satisfaction

Your overall experience working with the DOP during the recent sourcing event.

How the outcome of the sourcing event met your agency's objectives.

How supported you were during the sourcing event by the DOP Buyer/Purchasing Officer.

How important you felt your sourcing event project was to the DOP.

The communications with the DOP Buyer/Purchasing Officer during the sourcing event.

We would like to hear your feedback on the following statements on a scale of 0 to 10:

1. The communication with the DOP during the recent sourcing event was:
   - 1: Poor
   - 2: Fair
   - 3: Good
   - 4: Excellent

2. The support you received from the DOP during the sourcing event was:
   - 1: Poor
   - 2: Fair
   - 3: Good
   - 4: Excellent

3. The importance you felt your sourcing event project was to the DOP was:
   - 1: Low
   - 2: Medium
   - 3: High

4. The outcome of the sourcing event met your agency's objectives.
   - 1: Disappointed
   - 2: Neutral
   - 3: Satisfied

5. Your overall experience working with the DOP during the recent sourcing event was:
   - 1: Unhappy
   - 2: Neutral
   - 3: Happy

If you have any other comments or feedback, please provide them below:
### New Team Members

<table>
<thead>
<tr>
<th>Name</th>
<th>Position</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Chelsea Robillard</strong></td>
<td>Lead Purchasing Officer</td>
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<tr>
<td><strong>Danny Downen</strong></td>
<td>Purchasing Officer</td>
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<tr>
<td><strong>Joey Nelson</strong></td>
<td>Buyer</td>
</tr>
<tr>
<td><strong>Kaylee Starman</strong></td>
<td>Buyer</td>
</tr>
<tr>
<td><strong>Regina Cabrera</strong></td>
<td>Contract Administrator</td>
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<tr>
<td><strong>Steve Bailey</strong></td>
<td>Administrator</td>
</tr>
<tr>
<td><strong>Valerie Bollinger</strong></td>
<td>Purchasing Manager</td>
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<tr>
<td><strong>Jason Uruquart</strong></td>
<td>Lead Purchasing Officer</td>
</tr>
<tr>
<td><strong>Gregory Lindstrom</strong></td>
<td>Purchasing Officer</td>
</tr>
<tr>
<td><strong>Arianne Quiqnon</strong></td>
<td>Purchasing Officer</td>
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<tr>
<td><strong>Kim Guevara</strong></td>
<td>Buyer</td>
</tr>
<tr>
<td><strong>Maria Minicucci</strong></td>
<td>Contract Administrator</td>
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<tr>
<td><strong>Karen Butler</strong></td>
<td>Data Coordinator</td>
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<tr>
<td><strong>Forrest Benedict</strong></td>
<td>Training Specialist</td>
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<tr>
<td><strong>Linda Edkins</strong></td>
<td>Office Specialist</td>
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<tr>
<td><strong>Laura Gallivan</strong></td>
<td>Office Specialist</td>
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<tr>
<td><strong>Sam Sibert</strong></td>
<td>Federal Surplus</td>
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<tr>
<td><strong>Hattie King</strong></td>
<td>Technical Records</td>
</tr>
<tr>
<td><strong>James Lusk</strong></td>
<td>Storekeeper</td>
</tr>
<tr>
<td><strong>William Cook</strong></td>
<td>Storekeeper</td>
</tr>
<tr>
<td><strong>Joey Nelson</strong></td>
<td>Buyer</td>
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New DOP Website
Upcoming Events

- **Purchasing Advisory Council**
  - An impartial, objective group providing advice, assistance, and support for the Division of Purchasing on matters that will strengthen purchasing for those served by our agency.
  - The PAC will be made-up of one or two representatives from:
    - Agency Purchasing
    - Agency Leadership
    - Private Industry Purchasing
    - Private Industry Entrepreneurs
    - Attorney General’s Office
    - Suppliers to the State of Idaho
    - Academia
Upcoming Events

**IT Purchasing Workshops**

- Three meetings will be conducted to address the unique aspects of purchasing IT hardware, software, and services with recommendations to optimize Idaho IT purchasing processes, terms and conditions, and activities.

- The three meeting participants and their objective will be:
  1. **IT suppliers to Idaho** - Identify areas of opportunity for improvement in IT purchasing
  2. **Idaho agency IT representatives** - Identify unique attributes of the IT environment that drive a unique approach to IT purchasing
  3. **Core group** - Representatives from DOP, ITS, agency IT and DAG review outcomes from session 1 & 2 and define improvements that will be implemented.
Upcoming Events

- **Purchasing Field Training**
  - Writing Specifications
  - Inspections, Acceptance and Performance Monitoring

- Coeur d’Alene
  - December 4

- Rigby
  - December 16
State Purchasing Manager’s Update

Valerie Bollinger
Statewide Contract Updates

DOP Staff
Statewide Contract Update

- Arianne
  - Copiers
  - Shredding
- Danny
  - Statewide Vehicles
  - Statewide Propane Release
  - Zone 3 Bulk Fuel
  - Rental Car

Purchasing Website
Luma Updates
Sheena Coles
Deputy Controller, Organizational Change Management
ILLUMINATING IDAHO’S FUTURE BUSINESS PROCESSES
Vision:

Acquire, implement, and sustain a statewide enterprise system that modernizes and transforms the way the State of Idaho does business, improves transparency, and provides a core foundation for the future.

Goals:

1. **An ERP solution** that all agencies will use for budget planning, financial management, procurement, payroll, and human capital management.

2. **Improve productivity** and reduce costs by eliminating redundant systems and unnecessary complexity required to perform operational and administrative services.

3. **Modernize and standardize** business processes for alignment with industry best practices inherent in COTS software for efficient workflow and accurate information reporting.

4. **Increase transparency** of government operations and expenses.

5. **Reduce risk exposure** associated with the current outdated software systems.

6. **Improve decision making** by capturing and being able to report consistent expandable set of data.

7. Ensure strength and efficiency of the State’s **Data security management**.
HISTORICAL PERSPECTIVE

- **Payroll** - Employee Information System (EIS) – 1987

- **Accounting** – Statewide Accounting & Reporting System (STARS) – 1988

- **Supporting Applications**
  - ITIME
  - Travel Express
  - IBIS
  - IPOPS
  - IPERFORM
MODERNIZE FOR THE FUTURE

• **Enterprise Resource Planning software** – Unifies Budget, Finance, Procurement, Payroll, HCM

• Mobile friendly, single sign on system provides ease of use and greater efficiency.

• Full cycle of procurement activities, from requisition through payment, including links with budgetary control, projects, and grants.
WHAT IS INCLUDED IN THE MODULES?

**Procurement**
- Supply Management
- Purchasing
- Contract Management
- Strategic Sourcing/Supplier Portal
- Order Management and Inventory Controls
- Punch-Out

**Budget**
- Budget Planning/Creation
- Budget Management

**Finance**
- Accounts Payable/Receivable
- Asset Management
- Cash Management
- General Ledger
- Grants
- Travel

**HCM**
- Global HR
- Health and Safety
- Employee Relations
- Talent Acquisition
- Talent Science
- Transition Management
- Position Budgeting
- Learning Management

**Payroll**
- Payroll
- Benefits
- Workforce Management
- Learning Management
PROJECT TIMELINE

Phase 1 Go-Live

OCT 2019

Phase 1 Implementation began for budget, finance, and procurement.

SUMMER 2021

Phase 2 implementation Begins for payroll and human capital management.

SUMMER 2021

JANUARY 2023

Phase 2 Go-Live
BUSINESS PROCESS REDESIGN (BPR) SESSIONS

November - January

BPR Workshops

What?  Why?

Luma Phases 1 & 2

February - April

Configuration Workshops

How?

Luma Phase 1 Only

Luma Print: Future State Processes  User Stories  *FRICE-W Inventory  Change Impacts

*Forms, Reports, Interfaces, Conversions, Enhancements, Workflow
INFOR PURCHASING

- All procurement-related applications within the solution work in conjunction with financial management and share common master data where appropriate.

- The full cycle of procurement activities, from requisition through payment, including links with budgetary control, projects, and grants.

- Infor Purchasing simplifies procurement processes by establishing vendor pricing agreements and contracts, creating, importing and maintaining item information, and creating and issuing several types of purchase orders.

- Goods can be received centrally or at individual departments, as well as with smart phones and tablet devices when requesters are away from their desks.
USER DASHBOARD

Requestor Landing Page
A single system, you will no longer need to login to multiple systems to get all necessary information.

Greater visibility on all contracts with greater reporting capability statewide.

Role based user dashboards configured to show your requisitions, contracts, etc.
THANK YOU!
EPAC Reporting
Danny Downen
IPRO Updates

Forrest Benedict
Jaggaer Update 19.3

IPRO
Cloud Updates

DOP

Purchasing Website
Open Discussion
All
Thank you

Next Workshop:
February 13, 2020