

DOP QUARTERLY WORKSHOP

February 20, 2019



AGENDA

- 9:00 – 9:05 Welcome (Valerie Bollinger)
- 9:05 – 9:15 Updates from the Administrator (Sarah Hilderbrand)
- 9:15 – 9:30 Updates/reminders from the State Purchasing Manager (Bollinger)
- 9:30 – 9:45 Statewide Contract updates (DOP Staff)
- 9:45 – 10:05 Introducing: New DA-1 form (Bollinger)
- 10:05 – 10:20 Networking Break
- 10:20 – 10:50 Training: Contract Renewals, Amendments, and Change Orders (Bollinger)
- 10:50 – 11:20 IPRO Transition Update (Bollinger, Karen Butler, Forrest Benedict)
- 11:20 – 11:45 Group Discussion: Performance Monitoring
- 11:45 – noon Wrap-up/Question and Answer

UPDATES FROM THE ADMINISTRATOR



UPDATES/REMINDERS FROM THE STATE PURCHASING MANAGER

- Deadline to submit year end requests is Friday, April 5
 - DOP will support agency request for encumbrance if request & draft are submitted prior to this deadline
 - Agencies may still submit requests after this deadline, but may not be permitted to encumber money if a contract is not awarded
- Reminder: Communications with DOP
 - To submit DA-1s and exemption requests, please email purchasing@adm.Idaho.gov
 - For IPRO help, please email IPRO@adm.Idaho.gov
- New online training: Statewide Contracts and Spending Limits



UPDATES/REMINDERS FROM THE STATE PURCHASING MANAGER

- Proof of Insurance

- When to ask vendors to submit documentation...?



- Checking for federal suspension/debarment

- Federal funds? Check www.sam.gov to make sure the vendor is not suspended or debarred.
 - Agencies must document debarment check at contract award AND before any renewals, amendments, etc.



- DOP Process Review



STATEWIDE CONTRACT UPDATES



FORM DA-1 (DOP 2019) - PURCHASE REQUISITION

*Indicates required field

INSTRUCTIONS:
 1. Complete all required fields.
 2. Under "Description of Property":
 a. For new purchases, include only costs associated with the "initial term."
 b. Indicate "renewal" or "amendment" for changes to existing contracts and describe the requested change.
 4. If you have different funding source caps for different aspects of the purchase (e.g. admin vs. programming), list these as separate line items.
 5. Sign and date form. Remember: the DA-1 must be signed by someone with authority to bind the agency; your signature affirms that the agency funds appropriated and available.
 6. Submit completed form to purchasing@adm.idaho.gov

AGENCY INFORMATION	
AGENCY NAME*	DELIVERY/SERVICE ADDRESS* (if mult, attach separately)
AGENCY CONTACT*	
PHONE*	INVOICE ADDRESS*
EMAIL*	
AGENCY CODE	AGENCY REQ. NO. (for internal tracking)

DESCRIPTION OF PROPERTY					
Item No.	Description*	QTY*	Unit of Measure*	Est. Unit Price*	Est. Total Price*
1					\$0.00
2					\$0.00
3					\$0.00
4					\$0.00
5					\$0.00
6					\$0.00
TOTAL ESTIMATED COST*					\$0.00

ADDITIONAL INFORMATION				
FOR NEW TERM CONTRACTS*:		FOR NEW PROCUREMENTS:	FOR RENEWALS/AMENDMENTS*:	MISC. AGENCY NOTES:
Total anticipated term (including renewals)		List of known vendors (optional):	Contract Number	
Total anticipated spend (with renewals)	\$		Contractor Name	
Do you have an ongoing appropriation to cover renewals?				

CERTIFICATION*: By submitting this DA-1, I hereby certify that the items specified in this requisition are requested by proper authority; they are necessary in the public service; and there are sufficient appropriation balances for payment at the totals indicated above.

Authorized Agency Signature	Printed Name	Date

NEW DA-1 FORM



NETWORKING BREAK

<https://vclock.com/timer/#countdown=00:15:00&enabled=0&seconds=900&title=Networking+Break>



RENEWALS, AMENDMENTS, AND CHANGE ORDERS

Training

RENEWALS

- For DOP-held contracts: DOP tracks expiration dates and will notify the agency if the contract can be renewed, typically about 3 months in advance of the expiration date.
 - The Agency should still be tracking expiration dates—reach out to the DOP contract administrator if you haven't received renewal notification as expected
 - Be sure to respond to DOP regarding the desire to renew as soon as possible. Leaving the renewal process to the last minute could result in expiration of the contract.
 - Work closely with DOP to plan for re-solicitation if you know there are no remaining renewals— 3 months may not be enough time (especially for an RFP).
- For Agency-held contracts: the Agency is responsible for tracking expiration dates and renewal options.



RENEWALS

- Renewals require mutual, written agreement of the parties. This is typically accomplished through a letter signed by the contract administrator and the Contractor.
- If the contract allows for price adjustments or minor, anticipated scope changes (such as application area for pest treatment), these changes can be captured as part of the renewal letter (rather than a formal amendment).
- If a contract is not renewed prior to the expiration, it **CANNOT** be renewed later.

A contract that has died, cannot be resurrected. In other words...

NO ZOMBIES.



AMENDMENTS

- In general, amendments are used to formalize changes to a contract, including changes to: cost, scope, terms & conditions, etc.
- Amendments have an impact on the legal rights and obligations of the parties and, therefore, must be completed by the contract administrator.
- Other than administrative amendments (e.g. correcting a typo), amendments must be agreed to by both parties, *in writing*.

AMENDMENTS

Can contracts be amended to add, delete, or change services?

It depends. In the *Syringa* case, the Idaho Supreme Court found that an amendment voided the entire contract because the change to the original RFP scope of work was too significant.

Agency

DOP

AMENDMENTS

- With no subsequent cases to interpret or refine the decision in *Syringa*, the Attorney General's office has recommended caution.
- For every proposed amendment, DOP (or the contract administrator) must analyze the significance of the change:
 - Was this change contemplated in the original solicitation?
 - Is there more than a 20% change in price or scope?
 - Might this change in scope have resulted in vendors bidding differently?
 - Would additional vendors have bid if this change was included in the original scope?
- If the required change is determined to be significant, it may be necessary to re-solicit.

AMENDMENTS

What if we need a significant change, but re-soliciting isn't an option?

Contact DOP. If re-solicitation is impractical, disadvantageous, or unreasonable, the Administrator may authorize the amendment through an exemption.

Agency

DOP

AMENDMENTS

For contracts administered by DOP...

- ✓ As soon as you identify the need for an amendment, contact the DOP contract administrator to discuss the desired change.
- ✓ If an amendment is an acceptable path forward, the agency and DOP should work together to draft the amendment document. (There is a template on the DOP website, or ask your DOP contact for a sample).
- ✓ Once the draft is finalized, it can be sent to the Contractor for signature. DOP is always the last to sign, at which point a change order can be completed in IPRO.

CHANGE ORDERS

- Change orders are how we accomplish renewals and amendments in IPRO
- For DOP-held contracts, change orders must be initiated by the Agency and completed by DOP.
- In WebProcure:
 - If DOP “owns” the contract → submit a new request that reflects the renewal/amendment. DOP will then issue a change order against the original contract and reject the request back to the Agency.
 - If the Agency “owns” the contract → the Agency must create a draft change order, reflect the renewal/amendment, and route the change order to DOP for completion.
- Remember: if the value of the change order is within the Agency’s DPA, you must add State DOP Buyer Pool as an ad hoc approver. DO NOT APPROVE without adding DOP.





I PRO TRANSITION



TRANSITION TIMELINE

February

- DOP process review
- Configuration

March

- Detailed timeline
- Data prep
- Supplier communications
- Begin testing

April

- Testing
- Data Migration
- Training

May

- Testing
- Training

June

- Go Live
~ June 13

WE NEED YOU!



- Confirm or update workflow and permissions
- Confirm or update list of contracts to be migrated
- Assist with system testing
- Attend training
- Plan solicitation timelines
 - We DO NOT plan to migrate any “live” solicitations → all solicitations issued in WebProcure need to be closed by June 18
 - If your solicitation will not be closed by June 18, you may need to wait until we are live in Jaggaer (anticipated Go Live: June 13)
 - Please communicate carefully with your DOP Lead to ensure timely completion of solicitations during the transition



PERFORMANCE MONITORING

Group Discussion

