Department of Administrative Services
Improving efficiency, compliance, and workplace performance

State Purchasing Division
APO/CUPO Meeting

July 31, 2018

APO/CUPO Meeting Agenda

July 31, 2018 – 10:00 AM – 3:00 PM

- **10:00 – 10:15   Welcome and Introductions – Lisa Eason**
- **10:15 – 10:25   Purpose – Lisa Eason**
- **10:25 – 10:45   Charting our Future**
- **10:45 – 11:15   Help Us Help You Recap from the GPC**
  Jan Pytelewski
- **11:15 – 11:45   Pipeline and Upcoming Sourcing Strategy Needs**
  Jan Pytelewski
- **11:45 – 12:45   Lunch Break**
- **12:45 – 2:30   Compliance, Policy, and Training & Outreach**
  Mary Chapman
- **2:30 – 2:45   Enterprise-Wide Audit of NIGP Codes**
  Gerald Schaefer
- **2:45 – 3:00   Wrap Up/ Next Steps – Lisa Eason**

Welcome!

Please introduce yourself to the group!

- Name
- Agency/University/Technical College/Municipality that you represent
- Location (i.e. Atlanta, Macon, Savannah, etc.)
- Years as an APO/CUPO
- Number of Staff on your team

Purpose

SPD, to increase networking and outreach with our customers, is engaging the APO/CUPO community to participate in up to 3 meetings annually for information sharing, networking, and strategic development.

Approach

- Implement a collaborative approach to policy development and strategic sourcing initiatives that is responsive to the needs identified by our customers.
- Leverage experience and knowledge of APO/CUPOs.
- Face to Face Meetings w/ Networking and Problem Solving Opportunities located strategically around the state.

Benefits

- Increased awareness of the needs of our customers resulting in relevant sourcing events, awareness of potential policy revisions and compliance practices.
- Networking and team building activities including mentoring opportunities and a statewide peer group operating as a resource for procurement professionals throughout the enterprise.

Charting Our Future – Customer Focus

- Ask our customers
  - What do you need to perform your job?
  - How can we assist?
  - What roadblocks or barriers are you encountering?
  - What can DOAS do to assist you?

- Listen to the responses.

- Learn from the answers.

- Implement change as needed.

Sourcing

❖ Introductions

❖ Help Us, Help You!
   Debrief

❖ SWC Pipelines

Help Us, Help You! Debrief

Scope	**Process**
Supply Base	**Categories**

Help Us Help You!

SWC SCOPE

- What is missing from some of our current SWCs?
- How should we improve our efforts to better understand your unique needs?
- Is what we have on SWC what you want?
- How can we account for different State entity needs?
  - Geography
  - Educational
  - Federal Funding

SWC SCOPE

Office Supplies

✓Expanded Product Scope:

    o Furniture < $100

    o Non-Catalog items

✓Future Contemplated Changes:

    o Breakroom Supplies

    o Peripherals

    o Basic Cleaning Supplies

Security/Surveillance (formerly CCTV)

✓Expanded Product Scope includes access control, intrusion detection and video cameras

    o Active Shooter Detection

    o Mass Notification Systems

    o Video Surveillance Systems including recording and storage

✓Body Worn Cameras

➢Under Consideration: Regional Suppliers + Statewide Suppliers

For ALL Future RFQs/RFPs

➢Asking for 1) Educational Pricing and 2) Additional Volume Discounts

Help Us, Help You! Debrief

Scope	Process
Help Us Help You!	
Supply Base	Categories

SWC PROCESS

- Are the SWC information Sheets found on TGM of value?

- Do we need to improve our ordering instructions?

- Do we need to improve how to explain/handle % discounts? Upfront Maintenance payments? Leases?

- How can we improve our communications?

- Do you want to have access to full SWC contract?

- How can we make it easier for you to find the right SWC?

SWC PROCESS

SWC Information Sheets

➢ Combine w/Benefits

➢ Pertinent Information First

➢ Clearly Presented

➢ Accurate

Full Access to SWC

➢ RFP/Q

➢ Contract Ts&Cs

➢ Suppliers' Final Responses

➢ Award Documents

Better Communications

✓ More Face-to-Face Interactions w/SPD

➢ Communicate Pertinent Changes in Clearer Fashion

➢ Updated Supplier Contacts

➢ SPD Discussion Board

➢ SWC List – Easier to Find

SWC PROCESS – Let's Hear It!

Ordering Instructions

SWC Webinar

SWC PROCESS

Add SWC List with Contract Management Contact Information
Clean-up Mandatory/Convenience SWC Listing
Clean-up Statewide Contract Webinar Section

Help Us, Help You! Debrief

Scope	Process
Supply Base	Categories

Help Us Help You!
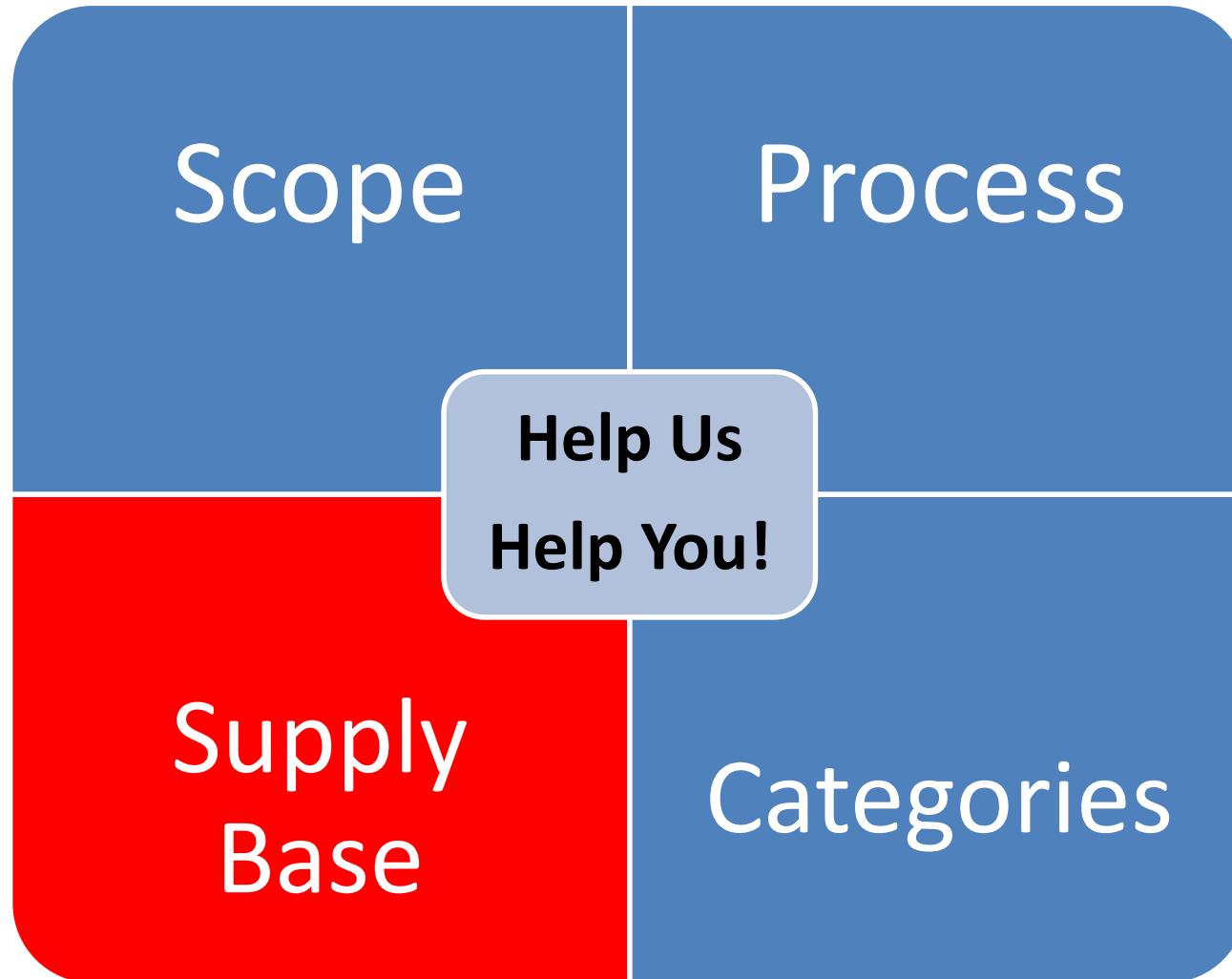
SWC Supply Base

- Do we have sufficient coverage in terms of the number of awarded suppliers?

- Do we have too many suppliers?

- Should we strive to have at least 2 suppliers per SWC (Office Supplies)

- Should we strive to include a least one Georgia-based business?

- How can we help our suppliers support you?

SWC Supply Base

Office Supplies

✓ Re-Sourcing Strategy – Award to At Least 2 Suppliers

▪ Furniture

➤ Concern – Too Many Suppliers

▪ Regionalism

✓ Small/Locals + Larger "Players"

✓ Integrated Surveillance and Security Solutions

Help Us, Help You! Debrief

Scope	Process
Supply Base	Categories

Help Us Help You!

SWC Categories

Top Categories Requested:

✓ Food Service/Food Distributors

➢ Water (Bottled + Service) + Ice

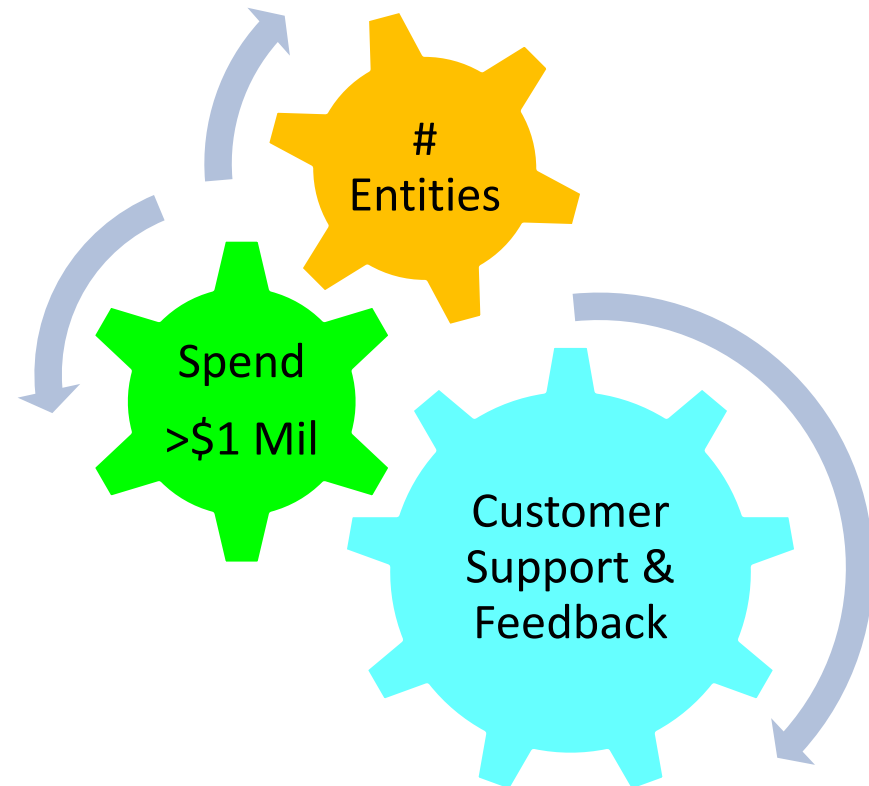➢ Floor Maintenance (Strip/Buff/Wax)

➢ Promotional Items

➢ Learning Management Systems

Entities

Spend >$1 Mil

Customer Support & Feedback

2018 SWC Pipeline - Status

Category	Issuing Officer	Need ID Stage 1	Pre-Solicitation Stage 2	Solicitation Prep Stage 3	Solicitation Process Stage 4	Evaluation Stage 5	Award Stage 6	Transition to Contract Mgmt Stage 7
Biological Supplies & Lab Equipment	Carol Kennedy-Sims			SCRC Approved	Rel 2/28/18 Closed 4/6/18		**Protested**	
Custodial & Hospitality Supplies	Mario Morales			SCRC Approved	Rel 10/26/17 Closed 11/16/17		**Awarded**	**Implemented**
Guns & Ammunition	Carol Kennedy-Sims			SCRC Approved	Rel 4/17/2018 Close 5/17/2018		**Awarded**	**In Implementation**
Industrial, Medical, and Special Gases	Matt Taylor			SCRC Approved	Rel 5/15/2018 Close 6/15/2018		**NOIA**	
Liquid Propane Gas	Matt Taylor			SCRC Approved	Rel 4/11/18 Closing 5/14/18		**Awarded**	**In Implementation**
Truck Chassis	Billy Gilbert			SCRC Approved	Rel 4/16/18 Closing 5/21/18		**Awarded**	**In Implementation**

2018 SWC Pipeline - Status

Category	Issuing Officer	Need ID Stage 1	Pre-Solicitation Stage 2	Solicitation Prep Stage 3	Solicitation Process Stage 4	Evaluation Stage 5	Award Stage 6	Transition to Contract Mgmt Stage 7
Mass Transit	Billy Gilbert			SCRC Approved	Rel 12/20/16 Closed 3/20/17		Awarded	In Implementation
Mass Transit Supplemental	Billy Gilbert			SCRC Approved	Rel 12/14/17 Close 2/6/18		Awarded	In Implementation
Personal Computers	Beverly Denson			SCRC Approved	Rel 5/1/2018 Close 7/12/2018			
Enterprise Infrastructure	Tetchjan Simpson			SCRC Approved	Rel 10/26/16 Closed 4/19/17			
Integrated Security & Surveillance Part 1	Ezeomo Akhirome			SCRC Approved Update Needed				
IT Temps MSP	Tetchjan Simpson			SCRC Approved	Rel 8/31/17 Closed 11/14/17		Protested	

2018 SWC Pipeline - Status

Category	Issuing Officer	Need ID Stage 1	Pre-Solicitation Stage 2	Solicitation Prep Stage 3	Solicitation Process Stage 4	Evaluation Stage 5	Award Stage 6	Transition to Contract Mgmt Stage 7
Printers, MFPs & Related Technologies	Bernie Joy			SCRC Approved	Rel 7/27/16 Closed 10/31/16		Awarded	Implemented
Cloud Computing Solutions (NASPO ValuePoint)	Beverly Denson			SCRC Approved Update Needed	Rel 8/23/17 Closed 9/7/17		Awaiting Supplier Signature	
Public Safety (NASPO Value Point)	Bernie Joy			SCRC Target Date 3/1/18	Rel 4/24/2018 Close 5/9/2018			
Mail Equipment (NASPOVaule Point)	Alicia Pope			SCRC Approved	Rel 2/12/18 Closed 2/28/18		Awaiting Supplier Signature	
Background Investigations	Alicia Pope			SCRC Approved	Rel 3/22/17 Closing 4/30/17			
Facilities Maintenance	Ezeomo Akhirome			SCRC Approved	Rel 4/2/18 Closing 5/18/18		NOIA	In Implementation
Management Consulting	Matt Taylor Jan Pytelewski			SCRC Approved	Rel 8/1/16 Closed 10/26/16		Final QC 2/15/18	
Office Supplies	Mario Morales			TBD	TBD			

SWC Sourcing Opportunities
What Should Be On FY2019 Pipeline???

Goods
Food Services/Food Distributors
Natural Gas – Firm Service
Natural Gas - Interruptible
Administrative Vehicles
Police Pursuit Vehicles
Hospital and Medical Supplies
ATVs/UTVs/Golf Carts
Bread
Maintenance Repair and Operations

Services & IT
Software
Security Services – Armed & Unarmed
Audio Visual Equipment & Services
Networking Equipment
Offset Printing & Related Services
Media Buying Services
Vehicle Leasing
In-State Car Rental
Capitol Hill/Airport Car Rental
Bus Rentals

Management Consulting Services Statewide Contract – In-Process Thinking About "Popping the Question"

- Request-for-Qualified Contractors (99999-SPD0000140)

- Final List Published in mid-February

- Working with Consulting Firms

Management Consulting Services Who Is the Best Partner?

Qualified Contractor	Operations	Human Resources	Strategic Planning	Procurement
Accenture	X	X	X	X
Berry, Dunn, McNeil & Parker			X	X
Calyptus				X
Deloitte	X	X	X	X
Ernst & Young		X	X	X
Ikaso				X
KPMG	X	X		X
Maximus Human Services	X			
McKinsey & Company	X	X	X	X
Management of America Consulting		X		
Navigator Management Partners	X	X	X	X
Procom	X	X	X	X
Protiviti			X	X
Public Consulting Group	X	X	X	X
Sequoia Consulting Group	X	X	X	
Slalom	X	X	X	
Summit Optimization Group	X	X	X	X
The Stores Consulting Group	X			

Agency Sourcing's Role

- **Review and authorize Sole Source announcements when the annual value exceeds $500K**

- **Delegate Purchasing Authority when solicitation events exceed $1M (unless documented otherwise)**

- **Offer technical support to Agencies and Universities with purchasing processes, solicitation recommendations and to support agency contract administration as needed**
  - **RFP Consultation**
  - **Contract Termination**
  - **Sourcing Alternatives**

- **Provide operational support for Agencies/Universities with limited procurement resources**

- **Assist in compliance evaluation by supporting audits and agency assessments**

See you at 1:00!

Compliance, Policy, and Training & Outreach

Mary Chapman

Help Us Help You! (Facilitated Feedback)

Procurement Training

1. What challenges does your procurement team face with training?

2. What is most valuable about the current training program (that you would like more of)?

3. What would you add or change to the certification paths and processes?

4. Are there additional topics/focus areas where you would like more training?

5. Would it be helpful for SPD Training staff to be a part of your onboarding process to establish the training plan for new staff?

6. Are you aware of services we provide such as system training at bid conferences? Other services that would be helpful to you?

Help Us Help You! (Facilitated Feedback)

Procurement Policy & Processes

1. What challenges does your procurement team face with procurement policies, forms and processes?

2. What is most valuable about the current policies, forms or processes (that you would like more of)?

3. What would you add or change in current policies, forms or processes?

4. Are there policies, forms or processes where you would like more training or guidance?

5. What is the most useful tool to you on the SPD website? And the least useful?

6. Are there best practices that you use that you would recommend SPD adopt?

Help Us Help You! (Facilitated Feedback)

Communications and Outreach

1. What challenges does your procurement team face with procurement communications?

2. What is most valuable about the current communications (that you would like more of)?

3. Is SPD website content useful to you? What if anything would you add/change?

4. What do you search for the most on the SPD website?

5. Would you like web access to archived newsletters?

Enterprise-wide Audit of NIGP Codes

Gerald Schaefer/John Kreeger – SPD Audits

Why do we use NIGP Codes?

- Search for "NIGP" in the GPM. How many hits do you get?

NIGP

Rank ▲	Title
1	8.4.4. Re-Certification
2	1.2.4. Exempt Goods/Services by NIGP™ Code
3	8.1.1. State Entity Procurement Spend
4	1.3.4.4. Consortia or Cooperative Purchasing
5	2.3.2.2. Conducting Sole Source Purchases
6	6.3.1.1. Commodity Codes
7	I.3.3. Supplier Registration

According to Section 8.1.1 of the GPM:

"Spend is captured at the line level of purchase orders by either NIGP codes or by Purchase Type Codes

- NIGP _or_ PO Type
- So why do we spend so much time checking NIGP codes?

34

At the Enterprise-level, where should we focus our attention?

- **Which NIGP codes were used the most frequently?**
- **Which NIGP codes comprise the largest dollar amounts?**
- **Which NIGP codes were not used?**
  - Determine if there were 5-digit codes only used by state entities and not by college and universities.
  - Determine if there were 5-digit codes only used by college and universities and not by state entities.
- **Which NIGP codes were used infrequently?**
- **How accurate were the NIGP codes used?**
- **Were exempt NIGP codes used correctly?**
- **How many times were invalid NIGP codes used?**
- **What NIGP codes are used in solicitations?**
- **Were the NIGP codes used with statewide contracts correct?**

Use Data Analysis to build the real picture

- What does the data show?
- Does it look right?
- Compared to what?

Then share the data with our customers

Ask the customer:
- What does the data show you about your agency/school?
- Does it look right to you?
- What stands out from your data?
- Is something missing that you expected to see?

NIGP Code Survey

However, before we draw any conclusions we want to know how (and why) you use NIGP codes.

Please complete the survey/questionnaire that you will receive soon.

Your feedback is essential to the process.

Questions?

State Purchasing

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Wrap Up and Next Steps

Lisa Eason

Georgia Procurement Conference
April 23-25, 2019

Jekyll Island Convention Center

Call for Presentations – November, 2018
Registration – January, 2019

Teamworks / TGM Upgrade

Thursday October 4, 2018 – Tuesday October 9, 2018 System is Unavailable

Closing Times for Solicitations

You will receive information for comments in the near future:

- Issuing Officer in Office when bids close
- No bids to close on holidays
- Bids to close between 9:00 AM – 4:00 PM

Next APO/CUPO Meeting:

November 28, 2018
9:30 AM – 12:00 PM

Questions?