



Enterprise Leadership Team Improving Government Sub-Committee Project Charter

Title	Multi-Agency Price Agreement Delegation
Sponsors	Tami Dohrman, DOC Sarah Jo Chaplen, DAS Mark Williams, DOJ
Project Manager & Business Leads	Project Manager: Joel Metlen, Project Manager, DCBS Project Lead: Sarah Roth, CPO, Secretary of State
Problem Statement	<p>Subject to specific procedures and the criteria set forth in OAR 125 246 0165(9), DAS Procurement Policy may delegate authority to an agency to administer or participate in a cooperative procurement for a specific good or service.</p> <p>The state may miss out on the possible benefits, such as increased efficiency and buying power, of small or specialized cooperative procurement opportunities (e.g. handcuffs for all public safety agencies) when such opportunities don't become statewide price agreements and agencies fail to request delegations of authority from DAS for these procurements. Some agencies are unfamiliar with the delegation process and have difficulty determining the best circumstances in which to request the authority to conduct cooperative procurements.</p>
Project Purpose	<p>The purpose of this project is to examine and recommend improvements for the process, procedures, and criteria for multi-agency price agreements as well as identify and conduct a pilot agreement as mentioned in recommendation six¹ of the "Enterprise Procurement Improvements Final Report" issued by Ikaso Consulting LLC in June 2013. This project seeks to promote cross-agency collaboration and coordination by determining the best circumstances for using multi-agency price agreements and the potential benefits of such agreements, in order to fully utilize agencies' specific expertise and potentially improve the efficiency of the state's procurement procedures.</p>
Scope	<p>The scope of this project covers potential multi-agency price agreements such as for the procurement of flour, uniforms, signage, educational materials, etc. This project will include a pilot agreement in order to determine the potential benefits or issues related to the use of such agreements. Based on the outcome of the pilot, the project team will recommend improvements to the process, procedures, decision points, and criteria for delegating authority and conducting such cooperative procurements. The project team may also identify further multi-agency price agreement opportunities for the state as appropriate. This project will include consideration of the needs and involvement of local government partners, DAS agencies, and agencies with independent procurement authority. Please see Attachment A for clarification about the scope of this and other related procurement improvement projects.</p>

¹ Delegate Price Agreement Authority to Expert Agencies, in Appropriate Circumstances



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This project does not include Enterprise-wide price agreements for items such as office supplies, PC's, laptops, systems furniture, janitorial supplies, etc.

The project team will include representatives from DAS agencies as well as agencies with independent procurement authority, DAS Procurement Policy, DAS Procurement Services, DOJ, subject matter experts from across the enterprise, and various end users. The project team will elicit input and support from relevant communications specialists (for outreach), stakeholders, and partners as needed.

The project team will:

1. Collect resources / identify customers and stakeholders, including subject matter experts.
2. Review current delegation processes and approval criteria.
3. Recommend improvements to the process, procedures, decision points, and criteria, and possibly rule changes, for delegation approval, including level of DAS oversight and reporting, risk assessment, use of ORPIN, and other key terms.
4. Obtain feedback and approval for new criteria and process from appropriate stakeholders.
5. Identify appropriate multi-agency procurements that qualify for this project by reviewing current list of active contracts Enterprise-wide.
6. Select and recommend a cooperative procurement to serve as the pilot.
7. Subject to a delegation of authority, the administrator (lead) agency conducts procurement, in consultation with agency's end users and project team.
8. Lead agency awards the price agreement, and participating agencies request delegations of authority, if required.
9. DAS/lead agency enters agreement into ORPIN.
10. Lead agency manages contract and supplier relationship, serving as primary point of contact for customer service issues.
11. Project team evaluates pilot, recommends additional improvements to the cooperative agreement delegation process and criteria, and identifies additional opportunities for the state to pursue as appropriate.
12. Create an implementation, communication, and training plan for the multi-agency price agreement process

Project Approach & Duration

Expected Outcomes

The project team will develop improved criteria and procedures for multi-agency price agreements to foster better coordination and collaboration between agencies and determine the value of such agreements through the use of a pilot project. The project team may also identify further multi-agency price agreement opportunities



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for the state as appropriate.

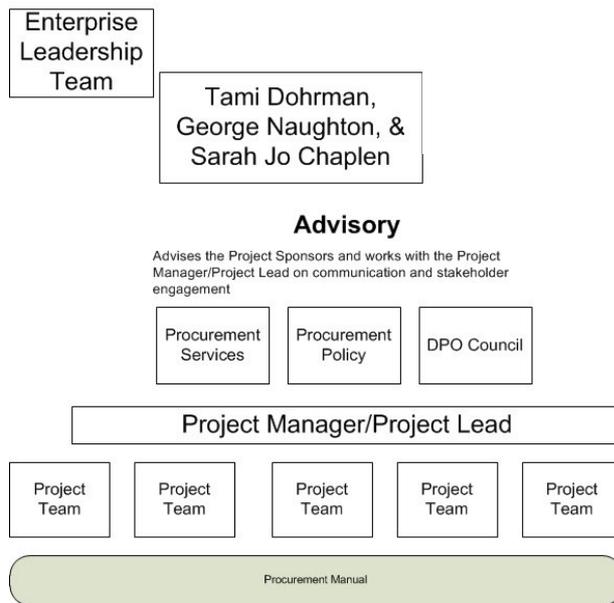
Customer Impact

Upon project completion customers will have clear, efficient guidelines and approval criteria for requesting multi-agency price agreements that utilize expertise in agencies for specific commodities.

Key Stakeholders

Key stakeholders are the Designated Procurement Officer (DPO) Council, DAS Procurement Services, DAS Procurement Policy, agency end users, and vendors. The project team will identify these stakeholders and analyze the best ways to keep them informed and engaged. The project team will use already existing stakeholder groups, the Enterprise Leadership Team, and Improving Government Sub-Committee for outreach.

Engagement Planning



This project will be governed by the Procurement Project Governance Diagram at left. The project teams will build stakeholder engagement opportunities into the project plan and will provide regular communication and opportunities for participation on project work groups.

The project team will use this governance structure to manage, assign, and elevate issues and roadblocks that arise during this and the related procurement projects to ensure proper stakeholders are engaged and utilized to resolve problems in an efficient and timely manner.

Funding & Resources

As a project sponsored by the Improving Government Steering Committee, this project will be resourced through outreach with the enterprise of state agencies.

Major Project Risks

While multi-agency price agreements could result in greater efficiency, the pilot may reveal issues and inefficiencies that make such agreements of little use to the state. A lack of buy-in from appropriate entities would also prohibit the development of a full fledged pilot agreement and thus make it difficult to measure the effectiveness of such agreements. Even if a pilot demonstrates that multi-agency price agreements can improve efficiency, clear criteria and processes, must be communicated and implemented in order to facilitate these agreements. If the guidelines are not clear



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or fail to be properly implemented, these agreements could prove inefficient.

Risks of not doing the project

While such agreements may or may not prove beneficial for the state, it is in the state's best interest to investigate alternative methods of doing business in order to continually improve its services. The Ikaso report indicated the possibility of increased efficiency and cost savings for the state through the use of multi-agency price agreements, and the state would miss out on the opportunity to possibly benefit from such agreements if it does not pursue this project.

Sponsor Approval Signature

Signed _____
Tami Dohrman

Date

Sponsor Approval Signature

Signed _____
Sarah Jo Chaplen

Date

Sponsor Approval Signature

Signed _____
Mark Williams

Date

Approved Project Change Requests:

<i>Change #</i>	<i>Date</i>	<i>Person</i>	<i>Change Description</i>



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Appendix A – This is a clarification of focus and scope for all procurement improvement sub-projects.

Project	In-Scope	Out-of-Scope
Templates, forms, and checklists	<ul style="list-style-type: none"> • Development of an enterprise-wide set of templates (including boilerplate contracts), forms, and checklists for all methods of procurement for all state agencies • Guidelines for the use of deliverables • Risk assessment tools 	<ul style="list-style-type: none"> • Internal agency tracking forms • Grant documents • Templates, forms, and checklists for local governments • Incorporation of documents and guidelines into procurement manual • Rule changes
Risk Alignment	<p>Examination and amendment of rules and procedures for all state agencies regarding:</p> <ul style="list-style-type: none"> • Determining risk • Setting risk-related limits • The use of experts in the risk assessment process • Criteria for determining the need for legal sufficiency review and the scope of review 	<ul style="list-style-type: none"> • Creation of risk assessment tools • Risk assessment for local governments • Incorporation of new rules and procedures into procurement manual • Examination of DOJ billing and management system (centralized vs. embedded resources, etc.)
Multi-agency Price Agreements	<ul style="list-style-type: none"> • All potential multi-agency price agreements for goods and services • A pilot cooperative procurement • Examination and recommendations for amendment of rules, procedures, process, and decision points for delegating authority for multi-agency price agreements • Identification of additional multi-agency price agreement opportunities • Consideration of the needs and involvement of local government partners, DAS agencies, and agencies with independent procurement authority 	<ul style="list-style-type: none"> • Incorporation of amended rules, procedures, process, and decision points into procurement manual • Statewide price agreements for general goods and services used by all or most agencies
Procurement Manual	<ul style="list-style-type: none"> • A statewide content management system for procurement rules, policies, procedures, templates, forms, checklists and best practices • Processes for common procurement methods • Incorporation of all deliverables from associated projects, including all changes in rules, policies, and procedures and all templates, forms, and checklists. • Guidelines for development of supplemental guides/materials • Training • Onboarding and handoff of manual • Development of ongoing maintenance procedures 	<ul style="list-style-type: none"> • Developing or amending any rules, policies, and procedures • Local government rules, policies, and procedures. • Development or amendment of content and deliverables generated by other projects, such as templates, forms, and checklists