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THE CHANGING FACE OF PUBLIC PROCUREMENT

Public procurement is changing from a transactions-based focus to playing a *strategic* role in government. Today's public professionals face more complex issues and play a more central role in their organization's performance. They are using more sophisticated sourcing tools such as "best value" evaluation and selection methods.

A recent white paper ([Responding to an Aging and Changing Workforce: Attracting, Retaining and Developing New Procurement Professionals](#)) by the National Association of State Procurement Officials (NASPO) offers insight into the current situation and ideas on how to prepare for the new generation of government workers.

- For the first time in history, there are a greater number of older citizens (in the U.S.) than younger;
 - As "baby boomers" age, a greater number of people will leave the workforce with fewer workers available to succeed them.
 - The number of government workers under the age of 35 is smaller than private sector.
 - The prevalence of older workers (knowledge workers) is higher in occupations that require specialized education, training or skills.
- Federal, state, and local governments will be challenged with replacing a higher percentage of their "knowledge workers".



Dianne Lancaster

Chief Procurement Officer

New procurement professional skill sets will be *essential* to meet the changing role of acquiring goods and services to maximize taxpayer dollars and the organization's goals.

The new procurement professional will need to be adept in:

- Communication skills (writing, negotiation, presentation)

THE CHANGING FACE OF PUBLIC PROCUREMENT

(CONTINUED FROM PAGE 1)

- Analyzing business problems (problem solving, critical thinking, research)
- Identifying alternatives
- Understanding market conditions and industry trends

Education and training are increasingly important to keep purchasing professionals aware of the changing trends and processes.

The 2008 Partners in Public Procurement Conference and Exhibitor Showcase –

“Facing Challenges and Finding Solutions”

– will feature nationally-known experts in sustainability, supply chain management and transportation, green procurement strategies and more.

Special guest speakers include:

Scot Case, Sustainability Consultant, TerraChoice

Marcia Deegler, Procurement Sustainability Coordinator, State of Massachusetts

Dr. Lee Buddress, Graduate School of Supply Chain Management, Portland State University

Dan Reisner, Freight Manager, State of Utah Procurement Office

Additionally, there will be sessions by legal experts for:

- Bid Rigging
- Public Works/Improvements/Construction
- Public Records Law
- Ethics
- Demystifying Terms and Conditions

Other class offerings include:

- Introduction to Green Procurement
- IT Contracting
- Contract Oversight & Accountability
- Rules/Policy Update
- Advanced ORPIN and ORPIN E-Bidding
- Risk Assessment and Management
- Disaster Preparedness Procurement Tools
- Contractor Performance & Accountability

“The challenge posed by all of the rapid changes in the responsibilities and skill sets of modern procurement officials is compounded by the rapidly aging workforce and the impending flood of retirees out of public procurement. Proactive strategies and solutions....will continue to be essential to the future success of state procurement.”

NASPO Research Paper –Responding to an Aging and Changing Workforce: Attracting, Retaining and Developing New Procurement Professionals

These are stressful but exciting times for government organizations. We’re faced with many challenges – from workforce succession planning, knowledge transfer, recruitment and retention, employee training and education – let’s find solutions together.

DAS RULE CHANGES ON WEBSITE



On July 2, 2008, DAS filed revised Public Contracting Rules, effective immediately. These Rules are posted at: <http://www.oregon.gov/DAS/SSD/SPO/ors279-menu.shtml>.

Procurement is a discriminating tool to accomplish Policies and meet Agency needs. The revised Rules tell us how this tool is used and who makes procurement decisions.

From 2005 to 2008, the Rules gave certain decisions to the State Procurement Office (SPO) while the Designated Procurement Officers (DPOs) developed in their roles. On July 2, 2008, the revised Rules gave some decision making to the DPOs. They now:

- approve Sole Source Procurements determinations up to \$150,000
- require or waive the use of a written solicitation for Intermediate Procurements up to \$100,000
- approve alternate Personal Services Contract forms up to \$100,000

Where the Rules were silent before July 2, 2008, the revised Rules now clarify:

- the difference between grants and public contracts
- the use of ORS 190 agreements
- leasing as part of selling
- affirmative action application

In addition, the revised Rules made housekeeping corrections like:

- streamlining the requirements for procurement files
- clarifying that only Contractors certify their independent contractor status
- clarifying electronic procurement processes

If you have questions, please contact Karen.Hartley@state.or.us or Brenda.J.Brown@state.or.us

A DAS Rules update session will be offered on August 20 at the Veterans Auditorium from 9 AM – Noon. Two Rules sessions will also be offered at the upcoming PPP Conference in October.

Conference information is available at: <http://tpps.das.state.or.us/surplus/partners/index.htm>

E-WASTE PROJECT UPDATE

The Department of Administrative Services' Surplus Property program partnership with Garten Services to process the state's electronic waste is going well!

Jan 1, 2008 to June 30, 2008 period:

Incoming e-waste weight = **156,962**

Weight of refurbished items sold ⁽¹⁾ = **56,593**

Rate of reuse by weight = **36%**

Gross Sales = **\$121,504**

⁽¹⁾ Weight partially estimated. Surplus does not capture the outgoing weight of items sold through its general store.



STATE OF OREGON PARTICIPATING IN NATIONAL "SWEATFREE" PROCUREMENT EFFORT

The State of Oregon is part of a national effort to secure third-party monitoring of factories that produce garments and uniforms. On July 21, 2008 a workgroup in New Hampshire will craft a request for proposals for auditing companies. Tim Jenks, a State Procurement Analyst working in the State Procurement Office will be representing Oregon. The goal of this effort is to ensure that uniforms and garments purchased by state agencies are produced under fair and humane conditions. Labor conditions in many garment factories are often horrific; long hours and harsh treatment of workers is common. Third party monitoring of factories coupled with fair labor language requirements in purchasing contracts can produce positive changes. However, there are many challenges:

- On-shore wholesalers may get their garments from many different overseas factories and may not know about labor conditions from each source.
- Huge garment factories often produce many brands of garments. Imposing fair labor conditions may be difficult since even large orders from state agencies may represent a small fraction of the total factory output.
- Currently there is not a transparent certification process to determine whether a factory is "certified sweatfree." This is a new initiative.
- Owners of factories resistant to fair labor standards can simply "cut and run"—close down the factory and move to another location. This can cause great hardship on local economies.
- Costs of garments purchased by government agencies will likely increase.

Sweat Free Communities, Inc., a non-profit headquartered in Bangor, Maine, has been a key player stimulating reform. This month they released a ground-breaking report, *Subsidizing Sweatshops: How Our Tax Dollars Fund the Race to the Bottom, and What Cities and States Can Do*. This report is based on face-to-face interviews in twelve factories in nine countries. Many problems were found including child labor, illegally low wages, forced overtime, and abuse of workers.

Resources:

"Subsidizing Sweatshops" report: http://www.sweatfree.org/docs/subsidizing_sweatshops_hr_bw.pdf

NEW CONTRACTS & UPCOMING PROJECTS

New Contracts:

- Copiers (5 Contracts) *see details below*
- Small Package Delivery Services (FedEx #8889)*
- Permanent Preformed Thermoplastic Pavement Markings—PA#8600
- CISCO Products PA#8605
- Satellite Phones (GlobalStar—PA#8613 and World Communications Center —PA #8614)
- Rain Gear (Watershed—PA#8630)
- Tires—Goodyear (WSCA Participating Addendum)

Upcoming Solicitations:

- Office Supplies (Oregon Lead State/WSCA Project)
- Large Reseller Software
- Telecommunications
- Systems Furniture & Ergonomic Chairs (extended)
- Skip Tracing Services (Rebid)
- Customer Uniform Trousers

COPIERS: There are 5 price agreements for rental only contracts for digital, multifunctional (including color) copiers.

| <u>PA#</u> | <u>Manufacturer</u> | <u>Contractor</u> |
|------------|---------------------|----------------------------|
| 8612 | Sharp | Pacific Office Automation |
| 8615 | Xerox | Xerox Corporation |
| 8616 | OCE` | OCE` North America |
| 8617 | Canon | IKON Office Solutions |
| 8618 | Ricoh | Ricoh Americas Corporation |



Delivery Services:

The State of Oregon, through the Western States Contracting Alliance (WSCA) has entered into an agreement with Federal Express for small package and express mail services. This contract is in addition to the UPS contract. The State's UPS contract has been amended to a convenience contract and state agencies and ORCPP members will now have the option to choose which service is best for them. Further, the State Procurement office hopes to have a third agreement with DHL finalized in August. A separate announcement will be sent once the DHL agreement is executed.



What's New in ORPIN and E-BIDDING

Agencies – Don't forget to take advantage of E-Bidding!

Are you posting a small to intermediate ITB or RFQ? E-Bidding is a great way to enhance the bidding process for your suppliers.

E-Bidding allows suppliers to submit electronic responses to contracting opportunities in a secure, paperless environment. It saves the supplier time and money because it eliminates the need for mail or hand-delivery, and reduces processing time for agencies by ensuring that Bids/Quotes are well organized and easy to find.

If your agency is interested in learning more about how to use E-Bidding, the ORPIN Team would be glad to discuss training possibilities and resources with you! For more information, please contact Gayle Montgomery at 503-378-4811 or Nicole LaFleur at 503-378-5858.

Buyers: Make sure to attach a copy of the Supplier Electronic Bid Response Procedures to all opportunities that accept electronic bid submissions. This will make the process easier for first time E-Bidders as it outlines the steps for submitting bids electronically through ORPIN. To obtain a copy of the Supplier Electronic Bid Response Procedures, visit the State Procurement website and click on 'EBidding General Information'.

Some helpful hints for searching in ORPIN:

- General Award Search vs. Contract Browse – Using General Award Search will allow you to see contracts that your agency is allowed to use. Contract Browse will display any contract in the system. This is helpful for research purposes, etc.
- When you use a keyword to look for commodities to add to an Opportunity, search by the root word. This will give you all variations of the word that appears within the commodity list. For example, searching for “transport” will give you commodities containing transporting, transportation, etc.

If you receive a Syntax Error while doing any type of search in ORPIN, try putting quotes around the search criteria you have entered. This should correct the problem and allow you to continue with your search.

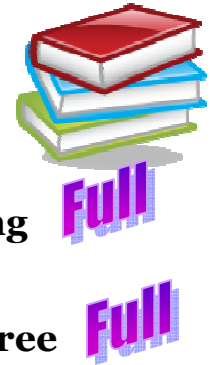
There will be an Advanced ORPIN training session – including e-bidding – at the PPP Conference in October.



Even if you're on the right track, you'll get run over if you just sit there.

Mark Twain

SUMMER TRAINING CALENDAR



| | | |
|-----------------|---|--|
| July 21-Aug. 12 | BA 161—Principles of Public Contracting | Full |
| Aug. 19 | Direct Purchase and Negotiation | |
| Aug. 19 & 21 | Train the Trainer (12 seats available) Free | Full |
| Aug. 26 | Government Report Writing | |
| Aug. 27-28 | OPBC Exam | |
| Sept. 9 | ORPIN Full System Training (16 seats available) | |
| Sept. 25 | ORPIN Training (Grants Pass SBDC) | |
| NEW! | Oct. 21-23 | Partners in Public Procurement Conference |

Coming Mid-September: **RFP: From Concept to Completion**

Classes fill up fast, so don't delay!

Class Registration Forms are available on the web at:

<http://procurement.oregon.gov/DAS/SSD/SPO/classes-offering.shtml>

Questions? Contact Kelly Stevens-Malnar at:

QUOTE FOR THE DAY:

"The most important thing in communication is to hear what isn't being said."

Peter F. Drucker

Register for the Partners in Public Procurement Conference today at:

<http://tpps.das.state.or.us/surplus/partners/index.htm>

Download/print the registration form and fax your completed form to (503) 378-3398

WORKING WITH SPO: TIPS FOR SUBMITTING YOUR PURCHASE REQUEST



Thinking about sending in a Purchase Request (PR) to the State Procurement Office (SPO) forwarding account? Want to be sure that you have all the necessary information attached to your request before clicking “submit” on ORPIN?

Below are some helpful guidelines to keep in mind when collecting the data and documentation SPO needs to process your PR for a solicitation or amendment action.

- A purpose or background statement that describes the circumstances, goals and needs surrounding your PR.
- What is the contract term? How long do you need the contract resulting from a solicitation to last? Or, if it is a PR for an amendment to an existing contract, how long is the term of that contract?
- The minimum requirements, qualifications, or specifications for the supplies or services you are seeking when submitting your PR.
- Any proposal evaluation criteria, if known or applicable.
- Brand Name Justification if applicable.
- Sole Source determination request along with documentation supporting the finding of a sole source, e.g. a signed letter from a supplier stating that what they supply is proprietary and they have no resellers.
- Estimated cost for the supplies or services.
- A draft Statement of Work, Scope of Work or specifications.

When submitting a draft Statement of Work, Scope of Work or specifications, **please do not send a completed draft of your RFP, ITB, or other solicitation type.** SPO has unique RFP formats and requirements that must be followed when a solicitation is created. SPO is standardizing the solicitations that it creates to promote consistency for its customers, reduce processing time and decrease resource costs for producing the solicitation (including DOJ costs). More importantly, SPO routinely works with different attorneys than the agency’s general counsel. When we send various versions to DOJ on a routine basis there is an additional, avoidable cost to SPO or the agency.

SPO asks that rather than submitting a full draft of a solicitation, only include a draft of the Statement of Work, Scope of Work or specifications and the above information. Let SPO draft the RFP or solicitation so you can spend more time on the Statement of Work and evaluation criteria development that will contribute to a successful purchasing outcome.

So you have your PR prepared, you have included your draft Statement of Work (but left out the draft of the RFP), and have all your supporting documentation attached and ready to go. Before you click “submit” in ORPIN check to see if you have included any of the additional information below to assist SPO in processing your PR.

- Any known proposal requirements.
- Any special terms and conditions such as Federal or Legislative requirements, and any special terms you may need in the solicitation or amendment beyond the standard terms and conditions used.
- The number of copies of each proposal you will need.
- Special insurance requirements to be addressed beyond the standard insurance requirements.

The PR is ready when/if you’ve checked for the four additional pieces of information above and attached all applicable documentation. After a PR is submitted it is added to the SPO forwarding account for assignment. Having all applicable information, specifications, requirements, and justifications ready ahead of time and attached to your PR helps us to complete the solicitation or amendment in an efficient and timely manner – avoiding the need to send/revert the PR back to the agency for further information.



Congratulations to the following new certificate holders!

OREGON PROCUREMENT BASIC CERTIFICATION

| | | |
|--------------------------------------|------------------------|----------------------------|
| Donna Aman | Mary Gehret | Sharon Martin |
| Keri Ashford | Toby Giddings | James Moering |
| Kristin Beach- Richardson | Daniel Grant | Carmela Nuestro |
| Shannon Becerra | Susan Herring | Shannon Peterson |
| Margie Becker | Rick Hethorn | Rhea Rodriguez |
| Kelly Blanchard | Nancy Holman | Joshua Rogers |
| Lisa Cimino | Jennifer Jolley | Blake Schwabauer |
| Kathryn Cromwell | Janet Klukis | Linda Spaccarotelli |
| Lesley Erickson | Sharon Landis | Steven Stein |
| Sara Fast | David Marsland | Debra Velasco |
| | Debra Marsland | |

OREGON CONTRACT ADMINISTRATION CERTIFICATE (OCAC)

| | | |
|-----------------------|-------------------------|-------------------------|
| Debra L. Scott | James C. Moering | Joshua L. Rogers |
| Mary S. Gehret | Laura Hince | Timothy Jenks |
| | | William Bolliger |
| Toby Giddings | Debra Owen | Connie Thorstad |

OREGON SMALL PROCUREMENT CERTIFICATE (OSPC)

| | | | |
|----------------------|------------------------|-------------------------|-----------------------|
| Mary Gehret | Joshua Rogers | James Moering | Sara Fast |
| Annette Young | Toby Giddings | Holley Oglesby | Donna Aman |
| Daniel Grant | Stacy Verschoor | William Bolliger | Rhea Rodriguez |
| Debra Velasco | Nicole Jantz | Rena Sawyer | |

2008

PARTNERS IN PUBLIC PROCUREMENT
EDUCATIONAL CONFERENCE AND EXHIBITOR SHOWCASE

OCTOBER 21-23, 2008 SALEM CONFERENCE CENTER



Facing Challenges – Finding Solutions

KEYNOTE PRESENTER:



Scot Case

TerraChoice
Environmental
Marketing, Inc.

Scot Case is an internationally recognized expert on responsible sourcing, green supply chains, and environmental marketing with almost 15 years of professional experience. Scot has delivered more than 250 keynote speeches, full-day trainings, and presentations throughout the United States and abroad. He has published more than four dozen articles, case studies, and book chapters. He currently writes a regular feature in *Government Procurement* magazine called “The Green Purchaser.” Scot also conducts responsible purchasing and green marketing trainings sessions that have been delivered to the National Institute of Governmental Purchasers; National Association of State Purchasing Officials; the U.S. Environmental Protection Agency; the World Bank; Portland, Oregon; Seattle, Washington; the Philippine Department of Natural Resources; the Japanese Green Purchasing Network; and scores of private sector companies including Wal-Mart, Microsoft, Starbucks, Hewlett Packard, and others. In 2002, he helped launch the North American Green Purchasing Initiative (NAGPI), a network of organizations working to accelerate the demand for safer, more environmentally preferable products. In 2005, he launched the Responsible Purchasing Network, a group of influential purchasers using their purchasing power to buy better sustainable goods and services. He is also a founding board member of the International Green Purchasing Network.

In addition to the Keynote address on Wednesday, October 22, Scot will be teaching the “*Introduction to Green Procurement*” session on 10/21 and participating in two panel discussions related to other sustainable procurement issues. Registration information is available at: <http://tpps.das.state.or.us/surplus/partners/index.htm>

Send in Your Registration Now!

OTHER PROCUREMENT TRAINING OPPORTUNITIES

| Date | Event | Location |
|--------------|---|------------------------------------|
| August 26-27 | CPPB Preparation Class | Salem |
| September 12 | OPPA Fall Workshop | Eola Viticulture Center/West Salem |
| October 21 | Government Contractor Certification (GCC) | Salem |
| November 6-7 | OPPA Fall Conference | Salishan |

For information/registration materials:

* <http://www.columbiachapternigp.org/>

www.oppaweb.org