DAS Enterprise Goods and Services

Procurement Services Program

Service Level Agreement (SLA)

Approved by:

DAS (Name and Title)

Kelly Mix, State Chief Procurement Officer	Date
Kelly Mix	December 14, 2022

Changes:

Date	Draft	DAS Staff Representative	Description of change

SERVICE LEVEL AGREEMENT
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1. Introduction

1.1. Objectives and purpose of Service Level Agreement (SLA)

The objective of this SLA document is to ensure both DAS Procurement Services (PS) staff and customers understand and agree how the services will be performed and the responsibilities and expectations of each party.

The SLA:

a) Describes the services provided by PS.

b) Identifies service level objectives and performance targets for the services, agreed upon between PS and customers.

c) Identifies responsibilities of each party.

d) Documents the following service management processes:

1. Performance tracking and reporting to customers.
2. Review and amendment of the SLA document.
3. Service-related dispute resolution.

This SLA document is not meant to be static, but a working document that will reflect the continuous change in services delivered by DAS, service delivery operating processes, and service level expectations agreed between PS and customers.

1.2. Identification of PS Program

1.2.1. Short description of PS program mission

Oregon Department of Administrative Services (DAS) works to effectively implement the policy and financial decisions made by the Governor and the Oregon Legislature.

PS is the enterprise-wide purchasing authority for the State of Oregon and fulfills a variety of roles within state government:

- Procurement of goods and services on behalf of state agencies, leveraging the purchasing power of local governments, state agencies and other states to ensure the cost-effective acquisition of goods and services.
- Providing training and consultation to employees of state and local governments, and suppliers on the application of purchasing laws, rules, procedures, and policies and best practice as recognized by the Universal Public Purchasing Certification Council.
- Maintenance of an enterprise-wide eProcurement system to support statewide procurement, purchasing and invoice settlement activities.

1.2.2. Applicable statutes, rules and policies

Statute Rule or Policy	Summary
Oregon Public Contracting Code	279A Applies to all public contracting
	279B Applies to supplies and services
	279C Applies to architectural, engineering, land

	surveying services and related services; and public improvements
	279.835-855 Applies to OregonForward Program
OAR 125-055-0005-0130	Rules governing the OregonForward Program
	HIPAA (Health Insurance Portability and Accountability Act) Privacy and Security Rule Implementation
OAR 125.246	General Provisions for Public Contracting
OAR 125.247	Public Procurement of Supplies and Services
OAR 125.248	Consultant Selection: Architectural, Engineering and Land Surveying Services and Related Services Contracts
OAR 125.249	General Provisions Related to Public Contracts for Construction Services
OAR 137.045	Division 45 Review of Public Contracts
OAR 137.046	Division 46 Model Rules – General Provisions Related to Public Contracting
OAR 137.047	Division 47 Model Rules – Public Procurements for Goods or Services
OAR 137.048	Division 48 Model Rules – Consultant Selection; Architectural, Engineering and Land Surveying Services and Related Services Contracts
OAR 137.049	Division 49 Model Rules - Procedures for Public Contracting for Construction Services.

2. Service Catalog

The service catalog lists and describes the main services PS provides to its customers.

2.1. List of services provided by PS program

A brief description of each service is included in the section below. For detailed descriptions, review the service catalog sheets in section 7.1 of this SLA document.

Service	Summary
1. Agency specific procurements	PS partners with customer agencies to facilitate the procurement process. Provides comprehensive agency specific procurement and contracting services to aid agencies in the development of agency specific solicitations and contracts.
2. Statewide Price Agreements	PS maintains a portfolio of Statewide Price Agreements and multi-jurisdictional cooperative procurements. These agreements are readily available to Authorized Agencies via the eProcurement system.
3. Procurement consultation	PS provides consultation services to DAS divisions and customer agencies to facilitate the procurement process. Consultation can be part of a full procurement process managed by PS, or a stand-alone service provided to the customer.

4. Training & certification services	PS provides Oregon specific, legislatively mandated public procurement related training services to all state government personnel who have procurement and contract administration responsibilities in their daily work. The program also maintains an Oregon Public Procurement certification program that has the goals of 1) improving the skills of public employees who spend public funds on goods and services, and 2) educating on procurement practices that promote fair, transparent, and responsible business practices consistent with Oregon Statutes and Administrative Rules.
5. Access to Enterprise eProcurement System	OregonBuys is the state's eProcurement system for accessing public agency procurement opportunities. Most state agencies and many local governments use OregonBuys to reach suppliers in order to procure goods and services. OregonBuys is the means by which agencies advertise procurement opportunities, meeting the requirements of Oregon's public contracting code.
6. Embedded procurement staff	PS may provide embedded staff into your team, depending on availability and approval by their manager.
7. Procurement policy services	PS reviews special requests for approval, provides policy guidance, and develops administrative rules. These services are paid by assessment to the agency.

3. Service Level Expectations

3.1. Performance metrics

This subsection identifies the metrics that will be used to track quality of service delivery along with timeliness and other service-related attributes. PS baseline timeframes are published on this webpage: https://www.oregon.gov/das/Procurement/Pages/SLA.aspx.

1) **Percent of agency specific procurements completed within the published baseline timeframes.**

2) **OregonBuys help desk effectiveness:** Average rating of effectiveness of OregonBuys help desk staff as per customer survey.

3) **Satisfaction with procurement training:** Average overall satisfaction rating on evaluation surveys completed by state agency employees who have finished any procurement training course.

4) **Satisfaction with PS Customer Service & Communication.**

3.2. Service levels / performance targets

Metric Number	Metric Description	Key Quality Attribute	Service Performance Metric applies to	SLE- (Agreed upon performance target)
1	Percent of agency specific procurements completed within the published baseline timeframes	Timeliness / cycle times	Agency Specific Procurement	85%
2	Average rating of OregonBuys help desk staff effectiveness as per customer survey	Effectiveness of OregonBuys help desk	Access to OregonBuys	9 (out of 10)

3	Average overall satisfaction rating on evaluation surveys completed by state agency employees who have finished any procurement training course	Satisfaction with training	Training and certification services	80%
4	Satisfaction with PS Customer Service & Communication	Timeliness of communication	Agency customers	80%

4. Financial Processes

4.1. Billing

- **Assessment:** PS assesses customer agencies on an annual basis. The assessment is based on each agency's FTE.

- **Training:** PS training billing is done through the registration process. Customers register for classes using Workday Learning and can pay with a credit card.

- **Vendor Collected Administrative Fees (VCAF):** Price agreement vendors are invoiced quarterly based on the VCAF percentage listed in the price agreement and the actual volume sales report (VSR) provided by the vendor.

4.2. Billing disputes

Billing disputes are handled by PS managers:

- Darwin Kumpula   (971) 900-7436   darwin.kumpula@das.oregon.gov
- John Anglemier   (971) 349-2346   john.anglemier@das.oregon.gov
- Norma Armstrong   (971) 209-9964   norma.armstrong@das.oregon.gov
- Brent Lutz   (971) 719-3436   brent.l.lutz@das.oregon.gov

Phone calls or emails describing the issue are quickly researched and addressed.

4.3. Payment
PS follows the standard State of Oregon terms of net 30 days on all invoicing.

5. Acronyms

- **CHRO:** Chief Human Resources Office.
- **COBID:** Certification Office for Business Inclusion and Diversity. This Office promotes opportunities for disadvantages business enterprises, minority-owned, woman-owned, service-disabled veterans owned, and emerging small business.
- **DAS:** Department of Administrative Services.
- **DAS-SFS:** Department of Administrative Services Shared Financial Services.
- **DOJ:** Department of Justice.
- **DPO:** Designated Procurement Officer.
- **EAM:** Enterprise Asset Management.
- **EGS:** Enterprise Goods and Services.
- **EIS:** Enterprise Information Services.
- **FAQ:** Frequently Asked Questions.

- **FTE:** Full-Time Equivalent
- **HIPAA:** Health Insurance Portability and Accountability Act.
- **IAA:** Interagency Agreement.
- **IGA:** Intergovernmental Agreement.
- **ITI:** Information Technology Investment Form.
- **ITB:** Invitation to Bid.
- **MBPO:** Master Blanket Purchase Order.
- **OA:** OregonBuys agency Organization Administrator.
- **OAR:** Oregon Administrative Rule.
- **ORCPP:** Oregon Cooperative Procurement Program.
- **OregonForward:** OregonForward Program formerly known as Qualified Rehabilitation Facilities (QRF).
- **ORS:** Oregon Revised Statute.
- **PO:** Purchase Order.
- **PS:** Procurement Services.
- **RFI:** Request for Information.
- **RFP:** Request for Proposal.
- **RFQ:** Request for Quote.
- **SA:** Service Agreement.
- **SFMA:** Statewide Financial Management Application
- **SFMS:** Statewide Financial Management System
- **SLA:** Service Level Agreement.
- **SLE:** Service Level Expectation.
- **VCAF:** Vendor Collected Administrative Fee.

6. Contact Data

- Procurement Services is located at:

  General Services Building (2nd floor)
  1225 Ferry Street, Salem OR, 97301
  503-378-4642
  https://www.oregon.gov/das/Procurement/Pages/Index.aspx

- Procurement Services Management Team:

Kelly Mix *State Chief Procurement Officer*	(971) 719-1680	kelly.mix@das.oregon.gov
Darwin Kumpula *Deputy Chief Procurement Officer*	(971) 900-7436	darwin.kumpula@das.oregon.gov
John Anglemier *Sourcing services contracts, OregonForward*	(971) 349-2346	john.anglemier@das.oregon.gov
Norma Armstrong *Sourcing Information Technology*	(971) 209-9964	norma.armstrong@das.oregon.gov
Brent Lutz *Sourcing commodities, construction & facilities*	(971) 719-3436	brent.l.lutz@das.oregon.gov

7. Appendixes

7.1. Service Catalog sheets

1 – Agency Specific Procurements	
1. What is the service?	**Description**

a. Service Summary	PS partners with customer agencies to facilitate the procurement process by providing comprehensive agency specific procurement and contracting services to aid agencies in the development of agency specific solicitations and contracts. These services include, but are not limited to the following:
	1. Determining the most efficient and cost-effective sourcing strategy - which may include utilization of an existing Statewide Price Agreement or the creation of an agency specific solution.
	2. Translating customer identified business outcomes into the language of procurement.
	3. Managing all phases of the procurement process, including:
	   a) Advertising the procurement opportunity,
	   b) Receiving responses to solicitations,
	   c) Leading agency subject matter experts in evaluating vendor responses,
	   d) Negotiating contract terms and conditions,
	   e) Executing contracts, and
	   f) Providing ongoing contract administration.
	4. Ensuring customer needs are met while at the same time providing solicitation documents that are legally sufficient and crafted to derive the best value for the state.

b. What is included?	1. Recommend, and apply the appropriate method of solicitation, evaluating the risk associated with the contract, advertising format, insurance requirements, and methods of compensation. 2. Consultation with client state agencies to mutually develop procurement timeline. 3. Review and provide feedback to agency representative on draft documents provided by the customer throughout the development of statement of work or specification documents. 4. Conduct market research on specific commodities or services for market trends, as needed. 5. In consultation with agency customer, prepare, issue, and monitor solicitations (i.e., RFPs, RFQs, invitations to bid, sole source, etc.), including addenda as required. 6. Plan, coordinate and lead pre-bid and pre-proposal conferences; interpret procurement regulations and answer questions about solicitation process. 7. Serve as chair of evaluation and negotiation committees, in compliance with state and federal rules and regulations. 8. Assess, determine, and prepare recommendation on the validity of offers' protests. 9. Examine and evaluate solicitation responses and ensure successful completion of the contractor selection process. 10. Review and develop contractual provisions based upon program requirements to minimize risk to the State of Oregon and facilitate Attorney General's approval when required. 11. Confer with client agencies, concerning contract terms and conditions. 12. Devise negotiating strategies with goals and alternatives. 13. Perform contract administration responsibilities, including:

	• Renew contracts after review from agency and attains mutual agreement between client agency and supplier. • Work with agency to resolve contractor performance issues. • Prepare contract amendments, extensions, or change orders ensuring compliance with original solicitation and contract requirements. • Manage contract terminations and contract breach actions.
c. What is not included in the service?	PS does not provide the following to agencies: 1. Technical specifications for products of services 2. Legal advice 3. Authority to conduct special procurements 4. Designations of agency DPO's 5. Budget expenditure approval to conduct procurement 6. Acceptance of deliverables, products, or services 7. Management of invoicing and payment processes

d. Offerings and options	A variety of options exist for meeting agency procurement and contracting needs. These include:
	1. Agency specific solicitation services that are all encompassing and may include one of these specific solicitation methods:
	   a) Request for Proposal (RFP)
	   b) Request for Quote (RFQ)
	   c) Invitation to Bid (ITB)
	   d) Special Procurement
	   e) Sole Source
	2. PS provides procurement services that do not require a new solicitation. These include:
	   a) Contract administration activities for contracts not established by PS, including:
	      • Amendments to existing contracts
	      • Reinstatement of expired contracts
	      • Retroactive approval of certain procurement actions
	      • Review of contractual terms and conditions
	   b) Interagency (IAA) and inter-governmental (IGA) agreements
	   c) Draft and execute OregonForward contracts
	   d) Direct awards based on $10k threshold
	   e) Issuance of work orders or purchase orders against existing contracts

e. Service Prerequisites	Customers must be an agency of the State of Oregon who are subject to DAS procurement statues and administrative rules; or otherwise, be able to delegate such authority to PS.
f. (Service-specific) Customer and provider responsibilities	**PS responsibilities:** • Procurement expertise that matches the correct skill level to the request • Timely response to customer request and timeline creation • Document management and version control during the procurement process • Post final contract and related documents in OregonBuys • Provide master contract file maintenance and retention • Inclusion of Risk Management and DOJ when necessary • Ensure EIS approvals are obtained when required **Customer responsibilities:** • ITI and business case development for information technology procurements • Submit request for PS in the prescribed manner • Provide statement of work, technical specifications, and/ or description of deliverables

- Determine schedule of payments
- Provide agency single point of contact to PS for the solicitation process
- Provide primary agency contacts for contract administration issues post contract execution
- Attend kick-off meeting, identify and invite agency resources such as agency procurement staff, subject matter experts and program managers
- Respond timely to requests for information
- Review and approve documents as requested
- Participate in vendor conferences, proposal evaluations, and contract negotiations as requested / needed
- Ensure budget authority to enter resulting contracts and to pay for any reviews requested or required of DOJ / PS

2. How is the service Requested?	Description	
a. How is this service requested?	Customers must request services through the submission of a requisition (REQ) through OregonBuys: https://oregonbuys.gov	
b. When can you expect to have your service request fulfilled?	**Step**	**Service Expectation**
	Acknowledge receipt of service request	2 business day from submission
	Assign PS staff resource	4 business days from submission
	Assigned PS staff Initial contact with requester	7 business days from submission
	Request fulfilled	Completion date will be based on approved project timeline as mutually agreed by PS and the requester.

3. How does PS provide support to customers?	Description
a. Self-service support	- General Information: https://www.oregon.gov/das/Procurement/Pages/Index.aspx - Public Contracting Code, Rules and Policies: https://www.oregon.gov/das/Procurement/Pages/Authlaw.aspx - Forms, Templates and Guidelines: https://www.oregon.gov/das/Procurement/Pages/library.aspx - Oregon Procurement Manual: https://www.oregon.gov/das/opm/Pages/Index.aspx
b. How to request support	Contact us by email: EGS.PSCustomerCare@das.oregon.gov
c. When can you expect a response?	Within two business days.

2 – Statewide Price Agreements	
1. What is the service?	**Description**

a. Service Summary	PS maintains a portfolio of approximately 430 Statewide Price Agreements and multi-jurisdictional cooperative procurements. These agreements are readily available to authorized agencies via the OregonBuys system and offer: 1) Pricing that is based on volume discounts achieved from leveraging the state's buying power across the enterprise. 2) Contracts that are continually managed to ensure the most strategic sourcing and efficient supply chain management possible. 3) Ability to quickly procure needed goods and services without having to conduct lengthy procurement processes.

b. What is included?	1. Access to a portfolio of established Statewide Price Agreements and multi-jurisdictional cooperative procurements that cover a broad spectrum of frequently used services and supplies in these general categories which is not an all-inclusive list as new agreements are added over time:
	  a. **Services:** Travel Management, Vehicle Rentals, Airfare, Lodging, Financial Services, Accounts Receivable / Debt Collection, Asset Related Equipment Inventory or Relocation, Disposal/ Recycling, Business Continuity, Disaster Recovery, Real Estate and Leasing Services. Auditing, Project Quality Assurance, Consultation, Contract Printing, Exam Certification, Facilitation, Interpretation / Translation; Transcription, Legal Services, Marketing, Staffing and Training
	  b. **Commodities:** Environment, Food, Textiles, Laboratory Equipment, Mailing Equipment, Medical & Dental Supplies, Pharmaceuticals, Public Safety Equipment, Supplies, janitorial Supplies, Auto Related Equipment, Fuel, Lubricants, Restaurant Equipment, Pain, Vehicles, and some may include services.
	  c. **Information Technology:** Audio / Video, Copiers, Hardware, SaaS, Services, Software and Telecom.
	  d. **Construction & Facilities:** Building Maintenance, Building Repair, Electrical, Facilities, Fire / Security, HVAC, Janitorial Services, Landscaping, Plumbing, Signage, Architectural and Engineering services (A&E), and A&E related services.
	2. Procurements that are in compliance with state and federal rules and regulations and that have been approved for legal sufficiency by DOJ.
	3. Contract administration, supplier performance audits, and supplier price compliance reviews.

c. What is not included in the service?	PS Statewide Price Agreements do not provide the following to agencies: 1. Ability to negotiate agency specific terms and conditions that materially differ from those in the price agreement. 2. Procurement transactions (i.e., purchase order, work orders, etc.). If an agency desires these services, please see service sheet for agency specific procurements. 3. Acceptance of deliverables, products, or services. 4. Management of invoicing and payment processes.
d. Offerings and options	Electronic access to a wide variety of established Statewide Price Agreements, including multi-state cooperative agreements.
e. Service prerequisites	• Customers must be an agency of the State of Oregon whose procurement authority is under DAS rules or a member of the Oregon Cooperative Procurement Program (ORCPP). • Access to OregonBuys eProcurement System: https://oregonbuys.gov

f. (Service-specific) Customer and provider responsibilities	**PS responsibilities:** • Maintain availability of Statewide Price Agreements and cooperative procurement contracts for critical goods and services. • Maximize agencies involvement in evaluating Statewide Price Agreements. • Conduct thought determination processes to determine if Statewide Price Agreements are the best mechanism for specific needs. • Inclusion of Risk Management, DOJ, and EIS when necessary. • Ongoing contract administration and vendor relationship management. **Customer responsibilities:** • Follow prescribed processes in each Statewide Price Agreement for ordering supplies/ services under a specific agreement. • Remain within the agency's procurement authority in accessing services supplies under Statewide Price Agreements. If it exceeds agency's procurement authority, submit request for procurement services in the prescribed manner. • Respond timely to requests for information. • Provide feedback and documentation on vendor performance to PS. • Participate in resolving disputes between vendors and agency. • Customers must have budget authority to enter resulting contracts.

2. How is the service requested?	**Description**	
a. How is this service requested?	Statewide Price Agreements are accessed through OregonBuys: https://oregonbuys.gov. To access services, go to OregonBuys and use the search function to find the price agreement.	
b. When can you expect to have your service request fulfilled?	**Step**	**Service Expectation**
	Ongoing	Ongoing access to existing Statewide Price Agreements

3.How does PS provide support to customers?	**Description**
a. Self-service support	• General Information: PS Website https://www.oregon.gov/das/Procurement/Pages/Index.aspx • Price agreements access: https://oregonbuys.gov • Review Buyer's Guide instructions provided with most price agreements • Contact the DAS contract administrator listed in OregonBuys
b. How to request support	Contact us by email: EGS.PSCustomerCare@das.oregon.gov
c. When can you expect a response?	Within two business days

3 – Procurement Consultation

1. What is the service?	**Description**
a. Service Summary	PS provides consultation services to DAS divisions and customer agencies to facilitate the procurement process. Consultation can be part of a full procurement process managed by PS, or a stand-alone service provided to the customer.

	Technical assistance can include, but is not limited to, generation of reports, market analysis, process mentorship, or problem research and resolution.
b. What is included?	1) Assisting in the design, development, and implementation of procurement strategies 2) Strategic sourcing - helping customers identify available sources for their procurement needs (i.e., Statewide Price Agreements, cooperative procurements, etc.) 3) Contract terms / conditions review 4) Contract administration assistance / supplier relationship management - strategies to identify relationship needs & conflict resolution management 5) Market research 6) Mentoring on procurement processes
c. What is not included in the service?	Consultation services do not include: 1) Conducting solicitation processes (RFP, ITB, etc.) 2) Providing legal advice 3) Delegating procurement authority 4) Designations of agency DPO's 5) Budget / expenditure approval to conduct procurement 6) Acceptance of deliverables, products, or services 7) Management of invoicing and payment processes 8) Active contract administration 9) Development or approval of agency internal procurement policies
d. Offerings and options	Consultation assistance can be requested in three general ways: 1) Informal requests for information or clarification sent via e-mail or via phone to PS staff. 2) Formal requests for documents review, strategy sessions, on-site consultations, etc. 3) As part of an agency specific procurement process in which PS is conducting the procurement. • **Additional Service**: PS can issue a RFI to the vendor community to assist agencies in gathering information and determining potential opportunities and costs for specific needs.
e. Service prerequisites	Requestor needs to be an agency of the State of Oregon or one of its political sub-divisions.

f. (Service-specific) Customer and provider responsibilities	**PS Responsibilities:**
	<u>Informal Request:</u> • Respond to informal customer inquiries within two business days. • Take responsibility for information we provide. <u>Formal Request:</u> • Acknowledge request within two business days. • Review and approve documents as requested within timeframes mutually agreed upon with customer. • Take responsibility for information we provide. • Refer customers to other resources if need is outside of our service line (PS Policy office, DOJ, etc.). **Customer Responsibilities:** <u>Informal Request:</u> • Initiate request for consultative services. • Provide as much detail as possible related to the issue you are requesting consultation about in order to expedite response. <u>Formal Request:</u> • Submit formal request for consultative services. Request should be submitted as outlined in section 2(b). • Attend meetings. • Identify agency resources such as agency procurement staff, subject matter experts and program managers. • Respond timely to requests for information. • Review and approve documents as requested.

2. How is the service requested?	**Description**
a. How is this service requested?	For informal consultations, customers may contact PS via e-mail at EGS.PSCustomerCare@das.oregon.gov For *formal consultation* requests: Customers must request services through the submission of a requisition (REQ) through the OregonBuys system. • If you need OregonBuys assistance submitting a request, contact the OregonBuys help desk at epro-support@periscopeholdings.com.

b. When can you expect to have your service request fulfilled?	**Informal Consultation Request**	
	Step	Service Expectation
	Acknowledge receipt of service request	2 business days from submission
	Formal Consultation Requests	
	Assign PS staff resource	4 business days from submission
	Assigned PS staff initial contact with requestor	7 business days from submission
	Request fulfilled	Completion date will be based on approved project timeline as mutually agreed by PS and the requestor

3. How does PS provide support to customers?	**Description**

a. Self-service support	PS website: • General Information: https://www.oregon.gov/das/Procurement/Pages/Index.aspx • Public Contracting Code, Rules, and Policies: https://www.oregon.gov/das/Procurement/Pages/Authlaw.aspx • Forms, templates, and guidelines: https://www.oregon.gov/das/Procurement/Pages/library.aspx • OregonBuys support email: epro-support@periscopeholdings.com
b. How to request support	E-mail: EGSPSCustomerCare@das.oregon.gov Phone: 503-378-4642 For formal consultation requests already assigned to a PS staff resource, please contact that person directly. See the staff phone list on our website: https://www.oregon.gov/das/Procurement/Pages/Teams.aspx
c. When can you expect a response?	Responses to initial inquiries can be expected within two business days.

4 – Training & certification services	
1. What is the service?	**Description**
a. Service Summary	PS provides Oregon specific public procurement related training and customized training services to state and local government personnel who have procurement, purchasing and contract administration responsibilities in their daily work. The program also maintains an Oregon credentialing program that has the goals of 1) Improving the skills of public employees who spend public funds on goods and services, and 2) Educating on procurement practices that promote fair, transparent, and responsible business practices consistent with Oregon Statutes and Administrative Rules.

b. What is included?	1) Delivery of procurement training to a multitude of audiences using a variety of mechanisms:
	• Currently provide 132 contract hours of training on specific aspects of Oregon public procurement as mandated in ORS 279A.159 which is continually updated as new trainings are available.
	• Training is delivered via various media to include live instructor led online webinars, asynchronous online and in-person live instructor delivered content.
	• All training is offered through the state's learning management system, Workday Learning.
	2) Training materials to include student guides, exercise sheets and supplemental handouts are available online via Adobe Connect virtual classrooms for online webinars or the Articulate online training development software in Workday Learning
	3) Audiences include procurement staff, administrative staff, and program and project managers
	4) Testing and certification programs that offer three legislative mandated certificates of completion and three competency-based public procurement certifications tied to the tiered delegation program:
	• Certificates of completion
	    o Contract Administration Training Certificate
	    o Principles of Public Procurement
	    o Fundamentals of Procurement

	• Competency-based certifications:
	    ○ Oregon Procurement Basic Certification (OPBC)
	    ○ Oregon Procurement Intermediate Certification (OPIC)
	    ○ Oregon Procurement Advanced Certification (OPAC)
	5) Specialized workshops flexibly adapted to specific needs
	6) Consultation services regarding procurement training:
	    • Training program development for local, agency, and other states.
	    • Certification strategies for local, agency, and other states.
	    • Agency specific procurement training development and delivery by the PS Training Team.
	
	Procurement Certification Program Details:
	https://www.oregon.gov/das/Procurement/Pages/TrainingCertification.aspx
	
	Procurement training development standards
	https://www.oregon.gov/das/Procurement/Pages/trainingdev.aspx

c. What is not included in the service?	1. Core classes for other credentialing organizations 2. Development and delivery of customer specific course content not related to Oregon public procurement 3. Procurement policy determinations 4. Legal advice

d. Offerings and options	**Visit the PS training calendar webpage for current training offerings:**
	https://www.oregon.gov/das/Procurement/Pages/Training.aspx
	
	Oregon Procurement Certification program:
	Available certificates of completion and certifications:
	    • Oregon Project Management Certification Program (OPMCP)
	    • DAS PS - Demystifying Terms and Conditions
	    • DAS PS - Principles of Public Procurement WEBINAR
	    • DAS PS - Using Statewide Price Agreements
	    • DAS SPO - Writing a Statement of Work
	    • DAS - PS Procurement Rules
	    • Procurement Rules Briefing
	    • DAS - PS - 2020 Procurement Rules Briefing (Recorded)
	    • DAS - PS - 2021 Procurement Rules Briefing (Recorded)
	    • DAS PS Procurement Rules Briefing
	    • DAS PS - Fundamentals of Sustainable Procurement
	    • DAS PS - Market Research in Public Procurement
	    • DAS - PS - Small Procurements
	    • DAS - PS - Contract Administration Training Certificate
	    • DAS - PS Audits
	    • DAS - PS - Oregon Public Procurement Certification Program Overview 2022 (Recorded)
	    • DAS - PS Contract Remedies
	    • DAS - PS - Procurement Rules
	    • DAS - PS Contract Closeout
	    • DAS - PS Procurement Ethics
	    • DAS - PS Introduction to Negotiations
	    • DAS - PS Administering Contracts and Managing Vendors
	    • DAS - PS Introduction to Contract Administration
	    • DAS - PS Amendments and Change Orders
	    • DAS - PS Accepting Goods and Services & Paying Contractors
	    • DAS - PS Develop a Contract Administration Plan (CAP)
	    • DAS - PS - Procurement Preferences
	    • DAS - PS - Introducing the Certification Office for Business Inclusion and

	Diversity - Oregon Procurement • DAS-PS-Understanding and Utilization of Certification Office for Business Inclusion & Diversity (COBID) Certified Firms • DAS - PS - Statewide Policy and Procedure for Business Equity, Inclusion and Engagement in Public Procurement • DAS - PS - Competencies and the Procurement Professional Live Webinar • DAS - PS - Pay Equity 2017 Protected Class • DAS - PS - Prevailing Wage • DAS - Risk Management - Risk Insurance Assessment Tool • DAS - PS - Principles of Public Procurement: Risk Management 1 • DAS - PS - Principles of Public Procurement: Risk Management 2 • DAS - PS - Principles of Public Procurement: Risk Management 3 • DAS - PS - Principles of Public Procurement: Risk Management 4 • DAS - PS - Principles of Public Procurement: Risk Management 5 • DAS PS Fundamentals of Procurement-WEBINAR • DAS PS - Legislative Updates and Working with COBID Firms (Governor's Marketplace) 2018 • DAS - PS - OregonBuys Basic Procurement User Training (Bid Solicitation & MBPO) Live Webinar
e. Service prerequisites	Requestor needs to be an employee of the State of Oregon or of one of its political sub-divisions.
f. (Service-specific) Customer and provider responsibilities	**PS training program responsibilities:** • Create quality curriculum on procurement statutes, rules and best practices governing public procurement in Oregon • Provide quality instruction related to public contracting laws and procurement policies that apply to all public entities subject to the Oregon procurement code • Maintain up to date course descriptions and class schedules on the state's Workday learning system • Provide class materials • Provide classroom space (in person or virtually) • Hold courses as scheduled, or timely notice of any logistic changes or class cancellations • Administer certification and credentials program and grant Oregon procurement credentials to individuals meeting program requirements **Customer responsibilities:** • Manager approval for enrollment / cancellation in classes through Workday Learning (includes payment). • Reporting self-reported learning events and tracking / monitoring credentials in Workday Learning. • Track expiration dates and timely request renewal and recertification. • Access to browsers or other technical requirements needed to complete class e-assignments, tests, or to access online resources per instructions.
2. How is the service requested?	**Description**
a. How is this service requested?	• Registering for training courses and managing enrollment is through the Workday Learning enrollment process. • Request for consultation services is accomplished by contacting PS training staff directly (see 3b).
b. What forms are used /needed to request this service?	• Workday Learning is available to state and local agency staff through logon accounts. The Workday Learning system is accessed at: https://wd5.myworkday.com/oregon • Requests for consultation services can be made via phone or e-mail (see 3b).

c. When can you expect to have your service request fulfilled?	• Workday Learning sends automated e-mail notices once course registration or cancellation is requested. • Initial requests for consultation services will be responded to within two business days.
3. How does PS provide support to customers?	**Description**
a. Self-service support	• Course registration and enrollment management are self-support activities through Workday Learning: https://wd5.myworkday.com/oregon • For assistance in navigating Workday Learning, see the guides: https://www.oregon.gov/das/HR/Pages/WDL%20Resources.aspx • Requests for consultative services can be made by contacting any of the PS training staff directly. See current PS staff roster linked in 3b below
b. How to request support	• Workday Learning: For assistance with your login ID or password, you can contact your agency Workday technical and HR contact https://www.oregon.gov/das/HR/Pages/Workday-Learning.aspx • To request consultative services or to share concerns about the PS training program, contact program staff directly. The current PS staff roster is located at: https://www.oregon.gov/das/Procurement/Pages/Teams.aspx
c. When can you expect a response?	• Response times for Workday Learning requests for assistance are not managed by PS • Responses to inquiries made to PS training staff will be made within two business days.

5 – Access to Enterprise eProcurement System	
1. What is the service?	**Description**
a. Service Summary	The OregonBuys system is Oregon's #1 resource for accessing public agency procurement opportunities. Most state agencies and many local governments use OregonBuys to reach suppliers in order to procure goods and services. OregonBuys is the means by which agencies advertise procurement opportunities, meeting the requirements of Oregon's public contracting code.
b. What is included?	• A web-based tool with access to Statewide Price Agreements and agency specific offerings • A means to advertise procurement opportunities to the public that meets the requirements of Oregon's public contracting code reporting for Green, COBID and other initiative participation • E-mail notifications of solicitation opportunities. Electronic bid submission for certain opportunity types • Tutorials for new users • OA Roundtables • Quarterly all day OregonBuys training for new users • Online training manuals • Visibility to registered, certified COBID suppliers • Vendor OregonBuys training which assists agencies in expanding their vendor pool • Agency based activity reporting • Help desk support available Monday thru Friday
c. What is not included in the service?	System customization

d. Offerings and options	Permissions based on the role and authority of individual users
e. Service prerequisites	Full access to OregonBuys requires establishing a user account
f. (Service-specific) Customer and provider responsibilities	**PS OregonBuys program responsibilities:** • Provide access to procurement and contracting information issued by the state of Oregon, local governments, and political subdivisions • Support and maintain system • Provide online resources, including tutorials and other self-help tools • Provide a high level of support/ training to OA so that they are able to manage their agency users • Submit annual reports for posting on the Oregon transparency website • Support end users without an OA through the help desk • Monitor and maintain COBID and SFMS data import **Customer responsibilities:** • OA are expected to attend OA council meetings as requested and remain up to date on system changes and procedures • Provide at least one DPO to process approval step for the agency. Follow all systems guidelines • Use the system according to rule and policy
2. How is the service requested?	**Description**
a. How is this service requested?	Access for agency users of OregonBuys requires establishing a user account. To request a user account, contact your agency OA. If you're unsure who your agency OA is, contact the OregonBuys help desk at epro-support@periscopeholdings.com for assistance.
b. What forms are used / needed to request this service?	Contact the OregonBuys help desk at epro-support@periscopeholdings.com for assistance.
c. When can you expect to have your service request fulfilled?	• Requests for OregonBuys help desk services made during help desk business hours will be responded to within two business days • Requests to OA's responses will be based on individual agency procedure
3. How does PS provide support to customers?	**Description**
a. Self-service support	• See PS OregonBuys webpage at: https://oregonbuys.gov • Register for OregonBuys training via Workday Learning. For more information visit the Workday Learning website at: https://wd5.myworkday.com/oregon
b. How to request support	Contact the OregonBuys help desk: **By email:** Send an email to epro-support@periscopeholdings.com. Please be sure to include your company / organization name in your message so that we can easily find your account in OregonBuys. **By phone:** 1-888-472-9102*.* Response to email and voice mail will occur M-F, 7:30am -4:30pm
c. When can you expect a response?	OregonBuys help desk initial response time is within 45 minutes of the request.

6 – Embedded procurement staff	
1. What is this service?	**Description**
a. Service Summary	PS can provide staff to embed into your team, working as the procurement expert with your permanent staff for the purpose of conducting complex project specific procurements on behalf of your agency, or for the purpose of developing and strengthening the procurement expertise of an agency's internal procurement staff. From a partial embed (project specific, less than full time) to a yearlong, full-time engagement, PS can provide fully qualified and credentialed state procurement analysts and procurement and contract specialist that enable you to meet your business needs.
b. What is included?	Different from a job rotation, an embedded PS employee would conduct their work under their DAS procurement authority, continue to report to PS and remain an integral part of the PS team. Embedding offers a physical presence of a PS expert within your agency to provide services and expertise that may include, but are not limited to, the following: • Lead a cross-functional procurement team to plan and develop procurement strategies that meet agency business needs and result in procurement processes and contracts that are compliant with all public contracting statutes and administrative rules. • Devise negotiation strategies and serve as chair of evaluation and negotiation committees to obtain consensus on selection of contractors. • Advise and mentor agency management and procurement staff in best practice methods of conducting procurement.
c. What is not included in the service?	**Factors Affecting Availability** Due to the limited availability of this service, PS managers will evaluate our ability to fulfill each request for the assignment of embedded staff based on the following factors: 1) The number of PS employees currently on embed assignments 2) The specific customer needs, including: • Duration of the requested assignment • Specific skill sets required for the assignment • % **FTE** needed (full time, half-time, etc.). 3) Consider different PS employee's strengths and in depth knowledge of specific sourcing areas (i.e., I.T., Transportation, etc.) 4) Potential impact to PS operations and enterprise-wide service delivery should the request be fulfilled **Tasks/ Services out-of-scope** 1) Developing business case for the procurement project 2) Procurement project staff augmentation unrelated to a specific project or unrelated to development of the agency's procurement expertise 3) Providing legal advice 4) Delegating procurement authority 5) Designating an agency DPO 6) Budget/ expenditure approval to conduct procurement 7) Accepting deliverables, products, or services 8) Managing invoice and payment processes

d. Offerings and options	Each request to embed PS staff into other agencies requires unique negotiation and customization of the services to be provided, time commitments, level of expertise needed, etc. The service plan will reflect the specificity of the engagement the requesting agency has in mind, and therefore does not lend itself to a service catalog menu of offerings and options.
e. Service prerequisites	Customer agency and PS will enter into an IAA for the provision of embedded procurement services staff. Agreement must be approved by the State Chief Procurement Officer, DAS CHRO, and the appropriate staff at the requesting agency.
f. (Service specific) Customer and provider responsibilities	Customer will provide day to day direction and workload management of the embedded employee. Other customer and provider responsibilities will be defined in the interagency agreement that will articulate the specific details of each engagement.

2. How is the service requested?	Description
a. How is this requested?	Requests for embedded DAS PS staff should be made directly to the State Chief Procurement Officer. Visit this webpage for contact information: https://www.oregon.gov/das/Procurement/Pages/Teams.aspx
b. What forms are used / needed to request this service?	Initial request can be made in person, or via e-mail. The process to refine the request will involve written communications, and face to face meetings, that ultimately result in an IAA.
c. When can you expect to have your service request fulfilled?	Initial acknowledgement of the request will be within one business day.

3. How does PS provide support to customers?	Description
a. Self-service support	Contact the State Chief Procurement Officer for assistance with embedded staffing needs.
b. How to request support	Contact the State Chief Procurement Officer for assistance with embedded staffing needs.
c. When can you expect a response?	Initial response within one business day.

7 – Procurement policy services	

1. What is this service?	Description
a. Service summary	Approves special requests, provides policy guidance, develops administrative rules, provides consultation services, legislative tracking, and implementation. These services are paid by assessment to the agency.
b. What is included?	Requests for: • Special procurement • Exemption on construction procurement • Delegation of procurement authority • Assistance with policy matters
c. What is not included in the service?	Legal advice and agency specific policy advice is not included in this service.
d. Offerings and	See 2a below

options	
2. How is this service requested?	**Description**
a. How is this requested?	Requests for delegation, requests for special procurement, and exemptions are submitted through OregonBuys. Agencies should navigate to the DAS On Behalf of Organization in OregonBuys and submit an Open Market Requisition, selecting the appropriate request type from the "Type of Request" dropdown. Please refer to these instructions: https://www.oregon.gov/das/ORBuys/Documents/OregonBuysDAS_OBO_Guide.docx
b. What forms are used / needed to request this service?	Special procurement and delegation forms are posted on our website: https://www.oregon.gov/das/Procurement/Pages/ReqstSvcs.aspx

c. When can you expect to have your service request fulfilled?	Step	Service Expectation
	Acknowledge receipt of service request	2 business days from submission
	Assign PS staff resource	4 business days from submission
	Assigned PS staff Initial contact with requester	7 business days from submission
	Request fulfilled	Completion date will be based on approved project timeline as mutually agreed by PS and the requester.

3. How does PS provide support to customers?	**Description**
a. Self-service support	• General Information: https://www.oregon.gov/das/Procurement/Pages/Index.aspx • Public Contracting Code, Rules and Policies: https://www.oregon.gov/das/Procurement/Pages/Authlaw.aspx • Forms, Templates and Guidelines: https://www.oregon.gov/das/Procurement/Pages/library.aspx • Oregon Procurement Manual: https://www.oregon.gov/das/opm/Pages/Index.aspx
b. How to request support	Contact us by email: EGS.PSCustomerCare@das.oregon.gov
c. When can you expect a response?	Within two business days.

7.2 SLA performance measure data dictionaries

SLA Metric #1: **Percent of agency specific procurements completed within the published baseline timeframes.**

- **Description:** Percent of times PS completes Agency Specific procurements within the baseline timeframes for procurement type.

- **Purpose:** This measure is tracked to ensure that Agency Specific procurements

are completed within the baseline timeframes published by PS for procurement completion.

- **Comparability:** Many divisions or programs within DAS track similar timeliness performance measures, which allows for comparability of performance between different units / service providers within DAS;
  - o ETS tracks and reports tracks and reports the percent of times the division is able to meet the delivery date for standard service requests.
  - o DAS Maintenance Services tracks and reports the percent of times the program is able to meet the delivery date for maintenance projects.
  - o DAS Publishing and Distribution tracks and reports the percent of times the program is able to meet delivery date for printing and / or mailing jobs.

- **Measure calculation formula:**
  - o **A=(B/C) *100**
  - o **B** = Number of procurements completed during the measuring period in which the date of completion preceded or met the published baseline processing time,
  - o **C** = Number of procurements completed during measuring period.

- **Detailed measure definition / clarification:**
  - o Baseline timeframe is the average transaction processing time (by transaction type) established by PS and published on our website, in which PS will deliver to the requesting agency a completed, legally sufficient, contract.
    1. The transaction processing time begins on the date when a customer submits a complete Requisition to PS via OregonBuys. The transaction processing time ends when PS delivers to the requesting agency a completed, legally sufficient, contract.
    2. Time periods of when projects are on hold due to customer agency requests will not be included in the calculated transaction processing times.
    3. Any delays in the processing times that did not result from agency customer requests will be included in the calculated transaction processing times. Examples include:
       - Changes to the scope of the solicitation request not directly related to a change in the scope communicated by the customer agency.
       - Delays to the award process as a result of vendor protests.
       - Delays in legal or other required reviews.
  - o This performance measure will be tracked with the aid of PS workload tracking system or a similar Excel or database file allowing program staff to enter the Requisition received date and contract award date.

- **Baseline:** As published on PS website. Updated annually.

- **SLE (Quantitative performance target):** 85%.

- **Frequency of reporting/ measurement period:** Quarterly.

- **Attachments:** None.

SLA Metric #2: OregonBuys help desk effectiveness.

- **Description:** Average rating of OregonBuys help desk staff effectiveness as per customer survey.

- **Purpose:** The objective for this measure is to track <u>effectiveness of OregonBuys help desk in providing support to service requests received from customer agencies, and vendors.</u>

  It is expected that tracking and reporting on this measure will help PS make data-driven decisions regarding:
  - o Working with OregonBuys vendor to enforce contractual service level requirements.
  - o Technical support workflow / processes.
  - o Resource / workload balancing.
  - o Improve system user training and guidance documents.

- **Comparability:** No reliable organization or data source for comparison has been identified at this time.

- **Measure calculation formula:**
  - o **A= ∑B / n (number of evaluation surveys)**
  - o **B=** Rating (in a scale of 1-10, with 10 being the best) to specific question on "was your question or concern resolved, or were you referred to the appropriate contact who could?" included on transactional surveys sent to agency customers and vendors who have contacted PS OregonBuys help desk to request support.
  - o **n=** Number of surveys completed by agency customers in the measurement period.
  - o Results (score on "effectiveness of OregonBuys help desk" question) from all surveys received in the measurement period will be added up and divided by the total number of surveys received to calculate the average rating for.

- **Detailed measure definition / clarification:**
  - o This performance measure is tracked as a customer satisfaction survey.
  - o The survey tool is managed and deployed by PS.
  - o Surveys are sent weekly to all PS agency customers and vendors who have requested assistance from the OregonBuys help desk in the preceding week.
  - o Customers and vendors who contact the support desk multiple times in a survey period will receive only one survey and will respond cumulatively.
  - o Results are compiled quarterly and reported on the PS performance metric dashboard. OregonBuys Program administrator will use the data to work with OregonBuys vendor and PS management to refine program outcomes.

- **Exclusions:** None.

What is Tracked	What is Not Tracked
All service requests from vendors, ORCPP members, and end-users from	All service requests from local governments, school districts, etc.

state agencies irrespective of the reason for contacting the OregonBuys help desk.	All service requests from members of the general public.

- **Baseline:** None.
- **SLE (quantitative performance target):** 9 (in a 10-point scale).
- **Frequency of reporting / timeliness:** Quarterly.
- **Attachments:** None.

SLA Metric #3: Satisfaction with procurement training.

- **Description:** Average overall satisfaction rating on evaluation surveys completed by state agency employees and ORCPP members who have finished any procurement training course.

- **Purpose:** This measure tracks <u>satisfaction with training sessions</u> conducted by PS for state employees and ORCPP members.

  It is expected that tracking and reporting on this measure will assist PS to understand and make data-driven decisions to develop and deliver quality training courses.

  Sustained procurement training quality is expected to contribute to improve the skills of public employees who spend public funds on goods and services, and to contribute to procurement practices that promote fair, transparent, and responsible business practices consistent with Oregon Statutes and Administrative Rules.

- **Comparability**:
  A few divisions or programs track the quality of the training they provide to their customers:
    - As part of its SLA, CHRO tracks and reports on a similar metric (average satisfaction with training courses) for CHRO developed training content.
    - As part of its SLA, DAS Risk Management tracks and reports on the average rating received by attendees to safety training courses.

- **Measure calculation formula:**
    - **A= ∑B/n(number of training evaluation surveys)**
        - **A =** Results (score on "overall satisfaction with training received" question) from all evaluation surveys received in the designated measurement period for any training course(s) delivered to state employees will be added up and divided by the total number of evaluation surveys received to calculate the average rating for quality of training.
        - **∑ =** The sum of all individual ratings (B) for the procurement training course.
        - **B =** Rating (in a scale of 8 - 40, with 40 being the best) to specific question on "overall satisfaction with training received" included on training evaluation surveys completed by state employees who have finished any procurement training course in the measurement period.

- o **n =** number of training evaluation surveys completed by state employees in the measurement period.
- o This will be collected from each employee prior to course completion.

- • **Detailed measure definition / clarification:**
  - o The survey is composed of 8 questions, each rated on a 1-5 point scale with 5 being best.
  - o Completion of evaluations at the end of each training course is required prior to course completion. The data gathered will provide quantitative and qualitative feedback on the training received.

- • **Exclusions:** None.

- • **Baseline:** None.

- • **SLE (quantitative performance target):** Our performance target is a rating of 4 in a 5-point scale, or 80% satisfaction.

- • **Frequency of reporting/ timeliness:** Quarterly.

- • **Attachments:** None.

SLA Metric #4: Satisfaction with PS Customer Service & Communication.

- • **Description:** Average overall satisfaction rating on evaluation surveys completed by identified Point of Contact (POC) for each Agency Specific procurement conducted by PS.

- • **Purpose:** This measure tracks communication effectiveness and overall customer service satisfaction related to Agency Specific procurement activities conducted by PS for state agencies.

  It is expected that tracking and reporting on this measure will assist PS to understand and make data-driven decisions in order to develop and deliver quality services and timely / effective communication.

  Ultimately, timely, effective, and customer focused communications and services is expected to contribute to improved engagements between PS and state agencies. Feedback and data from this measure will contribute to PS practices that promote transparent and responsible business practices consistent with DAS' mission to serve state government.

- • **Comparability**: None.

- • **Measure calculation formula:**
  - o **A = (B / C)*100**
    - o **B=** Number of respondents to customer service and communication evaluation survey who answer "yes" to specific question ("Did a PS staff resource make initial contact with the agency requester within 7 business days from agency submission request?") in the measurement period.
    - o **C=** Number of responses to customer service and communication evaluation surveys received in the measurement period.
    - o The number of "yes" responses to the question on the survey will be tallied up and divided by the total number of surveys received, and then multiplied by 100 to calculate the percent figure.

- **Detailed measure definition / clarification:**
  - o Evaluation survey distributed to all POCs 30 days after REQ received, followed by another survey at project completion.
- **Exclusions:** None.
- **Baseline:** None.
- **SLE (quantitative performance target):** 80%.
- **Frequency of reporting/ timeliness:** Quarterly.
- **Attachments:** None.

7.3 Rate methodologies

Rate methodologies:

- **Central Government Service Charge.**
  PS assesses a portion of the total costs of running PS to agencies based on the number of FTE positions each agency is authorized for each biennial budget.

- **Oregon Cooperative Procurement Program (ORCPP) User Fee.**
  Biennial fee assessed to members of ORCPP based on member's total budget.

- **Vendor Collected Administrative Fee (VCAF).**
  Percent charged per purchases made by state agency or ORCPP members from Statewide Price Agreements maintained by PS. Standard VCAF rate is 2% and most cases is embedded into the cost authorized purchasers pay the vendor for the requested good or service. VCAF fees fund the OregonBuys procurement system as portions of PS operations.

- **Statewide Training Program.**
  Fee charged per attendee at PS training classes or other PS sponsored event.

- **Agency Specific Transaction Fees.**

- **Per transaction fee charged to agencies for conducing procurement activities on their behalf.** The fees list is published in the DAS Price List of Goods and Services available from the DAS Chief Finance Office.

The Fee for Service charges for each biennium are based on levels of activity in the subsequent biennium. The charges for all DAS services are based on the projected needs of the agency's FTE positions and current legislative approved program. If activities or levels of service change, DAS or the agency may request renegotiation of this agreement to ensure continued uninterrupted service and cost recovery to DAS.