

Procurement Transformation

WORKING TOGETHER TO IMPROVE PROCUREMENT IN NORTH CAROLINA

Message from the Project Manager

One of the key priorities for June is establishing a group of Change Agents among agency purchasing directors to help convey important communications to impacted staff, including their department's commitment to change.

The first meeting of Change Agents will be held during the month of July. I'll be in touch soon regarding the specific date and location.

Change Agents will serve in the first tier of a formal Procurement Transformation Governance structure, where

they will participate in making high-level decisions that will affect agencies statewide. They also will ensure that changes are implemented appropriately in their departments.

Members will review the draft Procurement Manual and other resources that eventually will be implemented statewide, as well as share ideas that may be beneficial to other agencies and feedback when there are concerns. In this essential role, Change Agents will be

our "eyes, ears and hands" during this on-going process.

For information about the role of Change Agents or to confirm attendance at the upcoming meeting, contact me at Jocelyn.Thornton@doa.nc.gov or 919-807-4555.



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Contractor hired to expedite Purchasing Manual

A contractor has been secured to expedite conversion of key contents developed by Procurement Transformation working groups into a new statewide Purchasing Manual. The resource will serve to standardize (where applicable) processes and procedures used by state agencies to purchase goods and services.

K3 Enterprises is a Service Disabled Veteran Owned Small Business

headquartered in Fayetteville. Its charge is to design and develop an instructional interactive procurement manual that will cover basic purchasing/contracting procedures, identify pertinent state guidance/documents, and incorporate training content.

To ensure that the manual is user friendly, easily accessed and updatable, it will feature a hyperlinked table of

contents and active links to referenced source links to referenced source documents.

Working with procurement subject matter experts statewide, K3 is expected to complete a draft of the manual by fall, with the goal of finalizing the document by the end of the year.



Try out several of the available training formats to familiarize yourself with new features of the upgraded system before it goes live in early July.

NC E-Procurement Upgrade Training Opportunities

By **Laura Haakenson**
NC E-Procurement @
Your Service

The NC E-Procurement team has created training for using the upgraded NC E-Procurement system. Training is available in several formats to update current users on changes and provide training assets to be used going forward, including:

Updated Job Aids provide users with detailed instructions on how to complete everyday tasks in NC E-Procurement in a PDF file format.

“What’s New” training webinars update all users on the new functionality of the upgraded system. A webinar was held on May 8 for NCAS agency users. A recording of the webinar is posted on the [NC E-Procurement web site](#).

The webinar for community college and school system users was held on June 14.



If you need password registration help or other assistance, please contact the NC E-Procurement Help Desk at 888) 211-7440, option 1, or ephelp-desk@its.nc.gov

Regional classroom training sessions provide designated entity contacts with an overview of new functionality and an opportunity to try out business scenarios in the training environment.

A **training environment** gives all users an opportunity to try out the upgraded NC E-Procurement before it goes live in July. Login information was distributed to all users by email.

Please contact the NC E-Procurement Help Desk if you need assistance accessing the training web site.

New online training modules, available in June on the [NC E-Procurement web site](#), provide more detailed training on general system functionality through a self-paced, on-demand environment in which users can refresh or build their NC E-Procurement knowledge.

Please try out several of the available training formats to familiarize yourself with the new features of the upgraded system before it goes live in early July.

Invitation for Bids form nearing finalization

The forms sub-team of the Policies and Procedures working group is in the process of finalizing the Invitation for Bids (IFB) form.

“Once completed it will be rolled out for agency input, and recommendations implemented as appropriate,”

said Facilitator Angie Dunaway.

The recommended IFB form will be provided to the State Purchasing Officer for review and consideration to ensure all legal requirements have been met and the form safeguards the State.

Once approved, the form will be provided to agencies for use, posted to the P&C website, and IPS loaded with the new form.

While the IFB draft is out for review, the team will begin work on the RFQ and RFP forms.

Survey results indicate support for standardization of processes

The online survey sent to statewide purchasers in May has delivered findings that will be taken into consideration as Procurement Transformation moves forward.

Nearly 100 responses were received from a mostly veteran group of procurement professionals. About 80 percent of respondents had at least five years of state government experience; 23 percent had more than 20 years as a state purchaser.

While the majority of respondents had job titles directly related to procurement, some noted that they were stock clerks, executive assistants and clerical employees when they first became responsible for purchasing goods and services for their agencies. Among those with procurement positions, the variety amply demonstrated the inconsistency of job titles,

responsibilities and descriptions statewide.

Twenty-percent of participants reported that no training was provided to help them acquire basic skills when they became a state purchaser, though 51 percent said the training they received was "very valuable." Many purchasers credit training opportunities provided by Purchase & Contract or Information Technology Services. Others relied of previous job experience, often in the private sector, or on-the-job training from co-workers.

There was considerable agreement as to what three resources would be most useful to a purchasing agent. A formal Statewide Purchasing Manual – which is in development – Standard Operating Procedures, and Administrative Codes and Statutes were

most often cited as "toolkit" necessities. Other common requests were standardized forms and other guides to enhance consistent application of processes, and increased opportunities for online and face-to-face training for e-Procurement and specific technical aspects of job duties.

When asked about their perception of Procurement Transformation, 51 percent of respondents indicated that they were positive. Uniformity of processes and procedures, faster and better results, and increased confidence through training and reliable resources were cited as benefits. Others hoped for improved access to catalogs, better communications between agencies and defined career path opportunities.

There was considerable agreement as to what three resources would be most useful to a purchasing agent.

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Procurement Transformation is an online publication of the Division of Purchase and Contract, N.C. Department of Administration. Additional information may be found online at <http://www.doa.nc.gov/procurement/>.

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