

Procurement Transformation

WORKING TOGETHER TO IMPROVE PROCUREMENT IN NORTH CAROLINA

Message from the Project Manager

Many of us involved in the Procurement Transformation project feel as if we've been running a marathon in our efforts to cover all the ground necessary for comprehensive, meaningful and effective change in the way the state buys goods and services.

In the last few weeks, however, some of the working groups have passed the baton, so to speak, to the Change Agents group charged with taking priority projects across the finish line by the end of the year – as well as initiate others that will launch soon after.

The committee already has met twice to prioritize projects to move Procurement Transfor-

mation to the next level, which will benefit both taxpayers and purchasing professionals statewide by standardizing best practices.



Current goals include completing and posting the new State Procurement Manual and Contract Administration/Monitoring Guide by the end of this year.

At the same time those resources are being finalized, relevant training will be developed. Overview training will

be provided for purchasers in several locations across the state during the first quarter of 2013. An online component also will be created, along with relevant training for specific job functions and career paths.

The Change Agents group has established several committees to address particular tasks necessary to advance transformation. Given the deadline to complete ongoing projects, these committees (see Page 2) will meet often and report on progress at monthly Change Agents group meetings.

Joelyn Shenton

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Harbinson named Change Agents Chair



Drew Harbinson
N.C. Department of Public Safety Purchasing Officer

Drew Harbinson, a career procurement professional who serves as Purchasing Officer for the N.C. Department of Public Safety, has been named as Chair of the Change Agents group.

In this role, Harbinson will conduct future meetings, attend committee meetings as needed, and communicate information to state

agency purchasing managers for distribution to all purchasers.

Additionally, he will represent all agency counterparts as a member of the second-tier performance Governance Structure (see Page 3), which will take actions or recommendations (if any) to the Executive Steering Committee for consideration.



Ask the State Purchasing Officer

It seems like we've been talking about Procurement Transformation for a long time. When are we going to see real changes?

When project was rolled out in August 2011, we



Got a question? Email: jill.lucas@doa.nc.gov

said that full implementation would take two to three years. I think we're right on target.

We have accomplished a great deal in terms of examining processes and procedures, drafting manuals, designing training and creating a process review and feedback structure, much of

which is scheduled for completion by the end of 2012. We also have created the Change Agents group.

The bottom line is that you will start to see blips on the radar during the next several months:

- a new, online purchasing manual written (as far as possible) in plain English, with clickable hot links for references to the procurement statutes and administrative code;
- a contract compliance manual, along with a compliance training program and class schedule beginning in early 2013; and
- substantial revisions

to the procurement sections of the administrative code that update and clarify existing provisions, add new flexibility and modify some procedures to make them more consistent with procedures of the Office of State-wide IT Procurement.

We've taken the time we thought was needed to avoid any changes occurring haphazardly. We want this result to be reasonable, practical, workable and successful. Working through your Change Agents (or by direct contact with P&C), we want your feedback as you see these changes begin to occur.

Committees of the Change Agents group

Purchasing Manual and Contract Administration Monitoring Guide

Completes and gains approval of Procurement Manual, Contract Administration/Monitoring Guide and training aides.

Chair: Michael Bryant, N.C. Department of Environment and Natural Resources

Co-Chair: Clarence Rogers, N.C. Department of Public Safety

Dion Elliott, Division of Purchase and Contract

Nikki Williams, N.C. A&T University

Leroy Kodak, Information Technology Services

Roger Odom, N.C. Department of Cultural Resources

Sandra Johnson, Office of the State Treasurer

Sherri Garte, N.C. Department of Health and Human Services

Job Descriptions and Career Paths

Reviews and creates procurement job descriptions and career path for all agents, including new contract specialist category.

Chair: John Robinson, N.C. State Ports Authority

Co-Chair: Don Nattress, Office of State Personnel

Melinda Williams, N.C. Department of Agriculture

Karl Sanders, Division of Purchase & Contract

Allison Tart, N.C. Department of Commerce

David Womble, N.C. Department of Health and Human Services

Operational Training Program

Develops structure for professional training to support state/national certification for purchasing agents.

Chair, Angie Dunaway, Division of Purchase & Contract

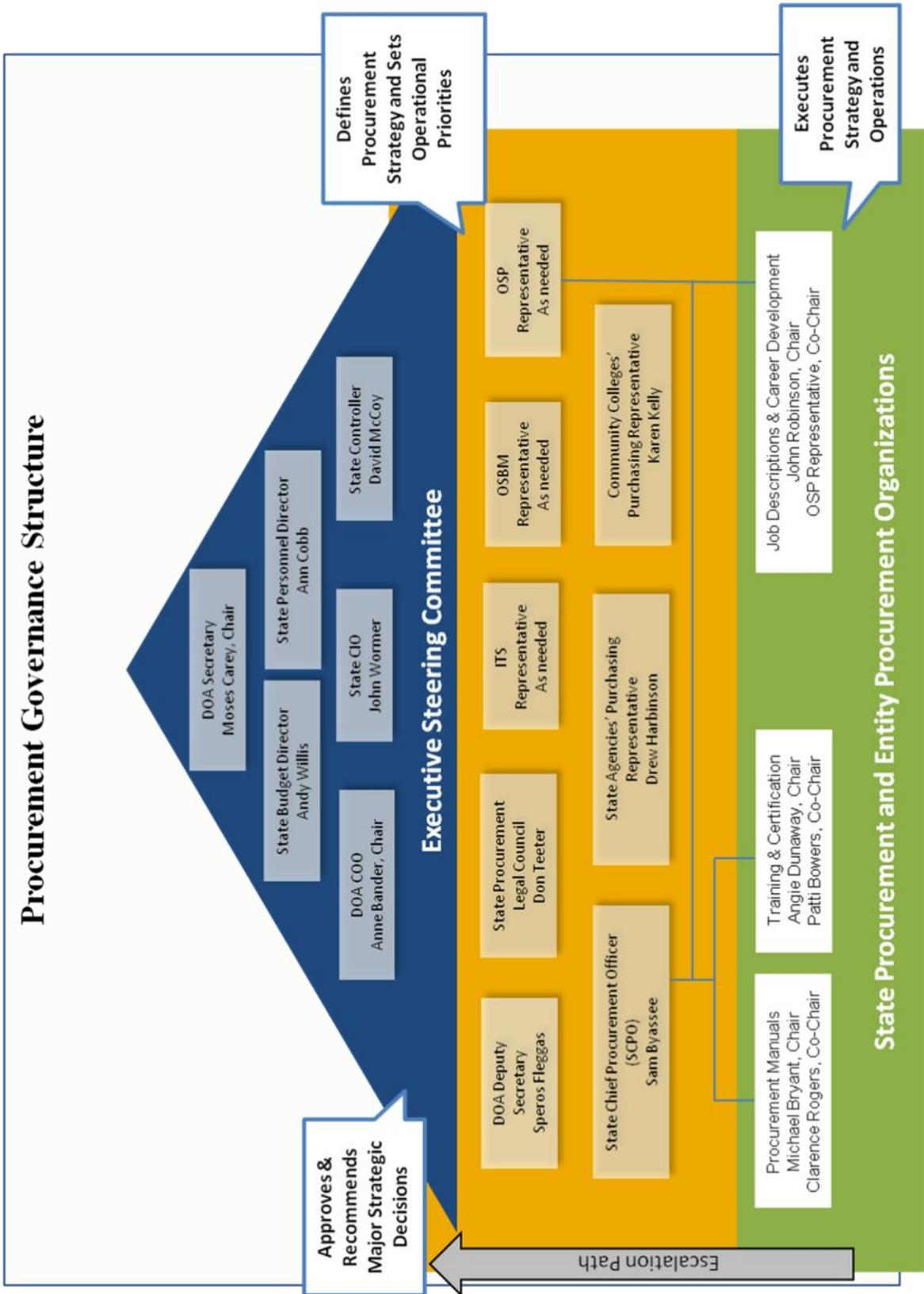
Co-Chair: Patti Bowers, N.C. Department of Transportation

James Brown, N.C. Department of Justice

Kristi Stewart, N.C. General Assembly

Amy Sampleton, Fayetteville Tech Community College

Jim Westbrook, Division of Purchase & Contract



Roles within Change Agents group

During the Sept. 20 Change Agents meetings, Project Manager Jocelyn Thornton outlined the new roles and responsibilities of the group, as well as the the new Procurement Governance Structure (see Page 3).

Change Agents Chair – (See Page 1, ‘Harbinson named Change Agents Chair’)

Committee Co-Chairs – Assume duties of Chair during temporary absence, perform duties as may be assigned by the Chair, participate in monthly meetings, and take minutes of meeting for distribution to group.

Governance Levels

Executive Level: Secretary of DOA, State Controller, State Budget Director, State Personnel Director, and State CIO.

Moses Carey Jr., Secretary
Anne Bander, Chief Operating Officer
Speros Fleggias, Senior Deputy Secretary
Sam Byassee, State Procurement Officer
Jocelyn Thornton, Project Manager

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/>.

For information or to submit suggestions or content, contact Jill Warren Lucas at 919-807-2496 or jill.lucas@doa.nc.gov.



From left: James Brown, Department of Justice; Leroy Kodak, Information Technology Services, and Sarah Ray of the Department of State Treasurer.

• **Mission:** Communications and oversight and support for statutory/policy changes as needed to ensure implementation.

Management Level: Senior representatives from the Department of Administration, Office of the State Controller, Office of State Budget and Management, Office of State Personnel, Information technology Services, UNC-General Administration, and the Community College System Office.

• **Mission:** Communications and oversight and review and recommend statutory/policy changes based on information provided by Implementation Teams and/or Change Agent group to ensure implementation.

Operational Level: Change Agents, who are the designated representatives from each state agency (many of whom are their chief purchasers).

• **Mission:** Communications throughout their agency and back to central purchasing entities ensure implementation strategies are carried out and as needed, provide feedback on what does and does not work, and promote change in procurement.

Planning Committees

– The planning committees/working groups are established to work on specific projects as necessary, plan work group meetings, provide minutes of progress and report to the full group of team results on a monthly basis.

Each committee will have task(s) that they will be responsible for executing within a specific timeframe. The timeframe will be established by the Transformation Project Manager, Chair and Co-Chair of each committee.