

Procurement Transformation

WORKING TOGETHER TO IMPROVE PROCUREMENT IN NORTH CAROLINA

Message from the Project Manager

The process of Procurement Transformation took a giant step forward on Aug. 8 when we convened the first meeting of our new Change Agents group. The team, listed on page 3, is comprised of members from numerous agencies representing the state's diverse purchasing power.

In the coming weeks and months, this group will assume a greater role in setting policy, implementing improved methods developed by original working groups, and ensuring that all efforts remain focused on making statewide procurement more effective and efficient for agencies and taxpayers.

At the same time, some of the working groups will begin closing out their assignments. The first group to dissolve will be Governance, as its work focused on developing core practices that now will be handled by Change Agents.

I cannot overstate the value and leadership demonstrated by its members, who were ably led by facilitator Patti Bowers of the Department of Transportation. I am grateful that several members have agreed to continue their service as Change Agents.

Change Agents will address several key opportunities in the closing months of 2012, including completion of

three essential projects: the Procurement Manual, the Contract Administration/Monitoring, and the Training Manual. Additionally, they will tweak and finalize the Performance Scorecard that will be used to measure critical outcomes related to statewide procurements.

In closing, I am pleased to report that considerable progress has been made with the Procurement Manual. We anticipate providing a first draft to Change Agents for review and feedback by the end of September.



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P&C reorganizes for better service

By Sam Byassee
State Purchasing Officer

As one of the first visible changes coming out of the ongoing Procurement Transformation project, the Division of Purchase and Contract has reorganized its three purchasing groups for better service, effective immediately.

Going forward, purchas-

ers in each group will handle only one category of transactions (open market, services or term contracts), which we believe will result in increased responsiveness and a shorter time frame to final award.

In addition, we are expanding our Compliance and Training group to handle the additional

responsibilities imposed by Session Law 2010-194.

In conjunction with this reorganization and several recent retirements, P&C is pleased to announce the addition of three new purchasing managers. Here is an introduction to our managers and the responsibilities of the groups

See **P&C** next page



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P&C

Continued from cover
they will be leading:

Jim Westbrook continues as P&C's senior purchasing manager and will lead the Sourcing/Term Contracts group. Jim's team will concentrate on keeping existing term contracts up to date and on developing new term contracts, with an emphasis on better sourcing analysis and greater interaction with end users to increase the efficiency of term contracts and to better leverage of the State's buying power. Jim's State government purchasing experience includes 24 years with P&C and the Department of Agriculture, including the past seven as a P&C purchasing manager.

Karl Sanders is the manager of the new Open Market group, which will handle single open-market transactions. Karl is a veteran of public procurement responsibilities at all levels of government. He is returning to P&C after serving more than four years as Chief of Purchasing and Contracts in the Department of Environment and Natural Resources.

Garey Graham is the manager of the Services group, which has responsibility for handling procurement for services and other related transactions. Garey has been a member of P&C for the past five years, specializing in service solicitations. He has more than 30 years' experience in procurement and supply-chain management duties in various public and private organizations.

Angie Dunaway has been named to the new position of Compliance and Training Manager, leading the group that conducts compliance assessments and procurement-related training activities. Angie's group is charged with expanding the existing compliance program, to include contract admini-

stration activities as well as purchasing procedures, and it also will develop and conduct an enhanced training program, broadening both the scope and frequency of statewide training classes. Her group also is responsible for maintaining procurement-related manuals, information updates and keeping the P&C website data current. Angie is a 10 year veteran of P&C, and she has additional purchasing experience with Statewide IT Procurement and UNC-Chapel Hill.

Don't hesitate to contact any one of these individuals if you have a question or other procurement matter related to the responsibilities of the group each is leading.



P&C managers Jim Westbrook, Karl Sanders, Angie Dunaway and Garey Graham (from left).

Membership of Change Agents group

The following individuals are serving as Change Agents for their respective agencies and to establish procurement guidelines to be implemented statewide:

- Anne Bander**
Department of Administration
- Crystal Berry**
Department of Insurance
- Patricia Bowers**
Department of Transportation
- James Brown**
Department of Justice
- Michael Bryant**
Department of Environment and Natural Resources
- Sam Byassee**
Purchase and Contract
- Deborah Cannady**
Office of Economic Investment and Recovery
- Thomas Cheek**
Office of State Controller
- Chuck Clements**
Department of Public Instruction
- Eugene Davis**
Department of Revenue
- Armetha Dickerson**
Office of State Budget and Management
- Angie Dunaway**
Purchase and Contract
- Cecilia Edgar**
Wildlife Resources Commission
- Dion Elliot**
Purchase and Contract
- Cindy Gilliam**
Office of the State Auditor
- Michele Goff**
N.C. Education Lottery
- Garey Graham**
Purchase and Contract
- Tonya Grimes**
Wake Tech Community College
- Drew Harbinson**
Department of Public Safety
- Wendy Holland**
Department of Insurance
- Amy Jaeger**
Department of Labor
- Avery Johnson**
DOA Office of Fiscal Management
- LeRoy Kodak**
Information Technology Systems
- Karen Kelly**
N.C. Community College System
- Tommy Kirby**
Wildlife Resources Commission
- Sherry Matthews**
DOC Employment Security Commission
- Melinda Mims**
Department of the Secretary of State
- Jackie Montgomery**
DOA Division of Motor Fleet Management
- Cynthia Nicholson**
N.C. Center for the Advancement of Teaching
- Roger Odom**
Department of Cultural Resources
- Sarah Ray**
Department of State Treasurer
- John Robinson**
N.C. Ports Authority
- Clarence Rogers**
Department of Public Safety
- Sharon Rosado**
N.C. Community College System
- Amy Samperton**
Fayetteville Tech Community College
- Karl Sanders**
Purchase and Contract
- Becky Sandling**
DPS-State Highway Patrol
- Charles Schutte**
Information Technology Systems
- Kristi Stewart**
N.C. General Assembly
- Allison Tart**
Department of Commerce
- Jocelyn Thornton**
Purchase and Contract
- Debra Wallace**
Wake Tech Community College
- Jim Westbrook**
Purchase and Contract
- Sandra Wilder**
Department of Health and Human Services
- Melinda Williams**
Department of Agriculture and Consumer Services
- Nikki Williams**
N.C. A&T University
- Toni Williams**
Wake Tech Community College
- David Womble**
Department of Health and Human Services



Ask the State Purchasing Officer

This issue of PROCUREMENT TRANSFORMATION launches a new feature, Ask the State Purchasing Officer, with replies by Sam Byassee. If we are unable to feature your question or comment, you will receive a response via email.

Sometimes the E-Procurement system takes a long time to move to the next step. A dialog box usually appears and says, "Please wait..." or "Working..." I don't have the time to call the service desk every time that happens. When are the speed issues going to be fixed?

Any new system (or major upgrade) usually requires some time for fine-tuning of configuration parameters and database processing in order to improve overall speed and efficiency, particularly during heavy usage periods. Often, the slowdown is dependent on exactly where a user is in the process or the order in which certain steps are executed.

The E-Procurement technical gurus have made great progress in tracking down most of these issues, but sometimes identifying the

particular tweak needed may be dependent on a user describing exactly what he or she was doing at the time or on uncovering common factors across a number of complaints.

For this reason, please **do** contact the Help Desk (888-211-7440, option 1 or ephelp-desk@its.nc.gov) when you experience a problem, even if you have reported what appears to be the same problem. Your report will help staff to eliminate possible causes and to isolate the true source and correct it.

It's not unusual for what seems to be a single common problem to actually consist of many small and very localized issues—each of which must be evaluated and eliminated individually. That appears to be the case with the remaining speed problems.

Please help with these mop-up efforts by contacting the Help Desk—as soon as the problem occurs, if possible—and be prepared to describe in detail what you're working on and where you are in the process. You will be part of the solution, even though the problem may continue for a time after you first report it.

Transformation is supposed to streamline procurement and make it more efficient, but we've received word of

a new step that will only add delays by requiring every new contract over \$1 million to have a legal review and "certification" before P&C will approve it. Why require this extra work?

The General Assembly established this review mandate—first, on all term contracts exceeding \$1 million, in 2010. It expanded the requirement last year to include all proposed contracts for "supplies, materials, printing, equipment and contractual services" above the \$1 million level.

The legislation required P&C to issue "rules, regulations and procedures" to ensure the appropriate submission of proposed contracts for legal review. Our goal is to make P&C's part of the process as simple and as non-intrusive as possible. Any suggestions to improve the process are welcome.

The single best way to streamline the review process is to get the appropriate agency legal counsel involved in the solicitation development process as early as you can. A lawyer who is already familiar with the subject matter and language of the solicitation can review the final contract document much more quickly than someone who must start the review process cold.



Got a question or comment? Email it to jill.lucas@doa.nc.gov.

Upgraded NC E-Procurement System logs more than 85,000 POs since July 3

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

On July 3, the upgraded NC E-Procurement system became available to all users across the State. Almost 1,500 people logged into the system on the first day and more than 85,000 purchase orders have been created since then.

The new system offers users improved catalog functionality, optimized approval flows, streamlined login through NCID and more current commodity codes. User feedback to the Help Desk indicates satisfaction with the new dashboard and portlets. Requesters say they like the “pop-up” design on the non-catalog page and approvers appreciate the detailed informa-

tion on the approval page.

User feedback is instrumental in assisting the Help Desk to optimize the system. The NC E-Procurement team will continue to tune the environment for performance and make improvements in the functionality. For example, some users reported that the automatic time out period was not long enough, so the team extended it from 15 minutes to 30 minutes with the July release.

Details on the upgrade and NC E-Procurement are available on the [NC](#)



[E-Procurement web site.](#)

The training materials will continue to be available on the [training page](#), including the job aids, online training modules and recorded webinars. Questions and comments can be directed to the NC E-Procurement Help Desk at 888-211-7440, option 1 or ephelp-desk@its.nc.gov.

Moses Carey Jr., Secretary
Anne Bander, Chief Operating Officer
Speros Fleggas, 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.

Woodall Retires

The Division of Purchase and Contract extends its deep appreciation and best wishes to **Karen Woodall**, a career state employee who retired in July with 15 years of service at P&C.

Karen served as facilitator of the Contact Management and Compliance group and provided extraordinary leadership in developing the template for the Contract Administration and Monitoring Guide.