



NIGP FORUM

Connecting Procurement Communities

PHILADELPHIA, PA ★ AUGUST 23-27, 2014

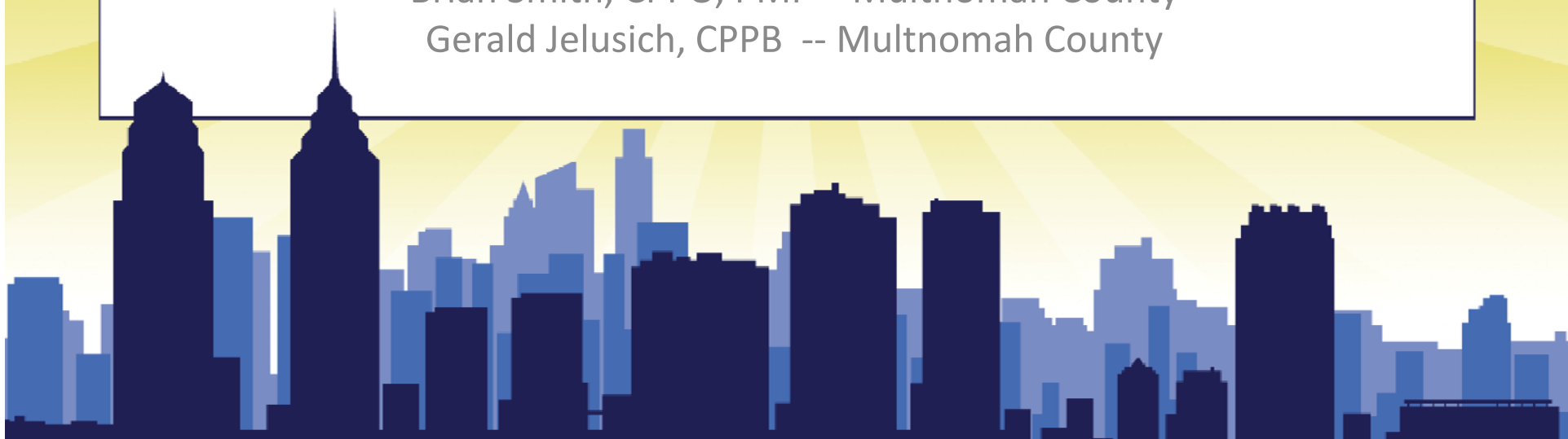
5 Steps to Communicating the Value of Procurement

Presented by:

Jonathan White – Spikes Cavell

Brian Smith, CPPO, PMP – Multnomah County

Gerald Jelusich, CPPB -- Multnomah County



The Challenge



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The Context

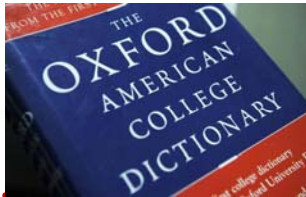


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Getting Started



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**STEP
ONE**



**STEP
TWO**



**STEP
THREE**



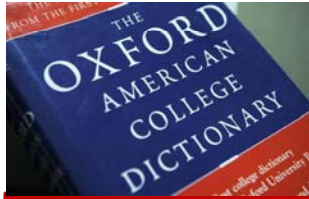
**STEP
FOUR**



**STEP
FIVE**



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STEP ONE

STEP ONE

Create a *Definitions* file



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STEP TWO

STEP TWO

Create a standard
data collection and
tracking process



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STEP THREE

STEP THREE

Select at least
one report each
month to review



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STEP FOUR

STEP FOUR

Identify candidates
for documenting
savings



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STEP FIVE

STEP FIVE

Choose candidates
for savings
(Examples)



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STEP FIVE

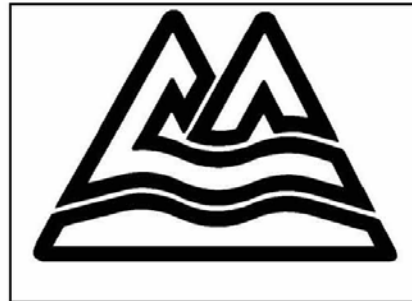
- *Examples*
- *Simplest is the Invitation To Bid (ITB)*
 - *Compare low bid price against average of non-awarded bidders – adopted practice*
 - *Don't include non-Responsive Bidders – adopted practice*
 - *Use one efficiency to capture savings – adopted practice*
 - *Projects take savings over life of project in equal increments – adopted practice*
 - *Don't include Engineer's Estimate - adopted practice*



GETTING STARTED – STEP FIVE – ITB Sample

PROJECT NUMBER	1300
PROJECT	Multnomah County Pavement Overlays 2014
LOCATION	Various locations in Multnomah County, Oregon
KIND OF WORK	Asphalt Concrete Overlay
BID NUMBER	4000002405
BID ADVERTISING DATES	April 25, 2014
BID OPENING DATE	May 15, 2014
PRE-BID CONFERENCE	None

SPECIFICATIONS FOR CONSTRUCTION



MULTNOMAH COUNTY

DEPARTMENT OF COMMUNITY SERVICES
LAND USE AND TRANSPORTATION PROGRAM



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GETTING STARTED – STEP 5 – ITB Value Added

Procurement Value Summary

Procurement Title	Multnomah Co. Pavement Overlays																					
Procurement Number	2014																					
Award Date (or cancelled date)	4000002405																					
Lead Procurment Analyst	Paula Rickman	5/21/2014																				
<div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> Cost Savings <table border="0" style="width: 100%;"> <tr> <td>Lakeside Industries</td> <td style="text-align: right;">\$483,475</td> </tr> <tr> <td>Brix Paving</td> <td style="text-align: right;">\$542,000</td> </tr> <tr> <td>Granite Const.</td> <td style="text-align: right;">\$497,497</td> </tr> <tr> <td>Knife River</td> <td style="text-align: right;">\$491,103</td> </tr> <tr> <td>S-2 Contractors</td> <td style="text-align: right;">\$537,903</td> </tr> <tr> <td>Engineer's Estimate (Discarded)</td> <td style="text-align: right;">\$700,000</td> </tr> <tr> <td>Average of Non-Awarded Bids & Estimate</td> <td style="text-align: right;">\$517,126</td> </tr> <tr> <td>Savings</td> <td style="text-align: right;">\$33,651</td> </tr> <tr> <td>Percent Savings</td> <td style="text-align: right;">7%</td> </tr> <tr> <td>Savings Period</td> <td style="text-align: right;">One-Time</td> </tr> </table> </div>			Lakeside Industries	\$483,475	Brix Paving	\$542,000	Granite Const.	\$497,497	Knife River	\$491,103	S-2 Contractors	\$537,903	Engineer's Estimate (Discarded)	\$700,000	Average of Non-Awarded Bids & Estimate	\$517,126	Savings	\$33,651	Percent Savings	7%	Savings Period	One-Time
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Engineer's Estimate (Discarded)	\$700,000																					
Average of Non-Awarded Bids & Estimate	\$517,126																					
Savings	\$33,651																					
Percent Savings	7%																					
Savings Period	One-Time																					
If this was cancelled, state the reason	No																					
Was this Previously Competed?	No																					

Value	What Purchasing Did	The Details
Early season bidding draws multiple bids during challenging staff changes	Helped department get bid documents ready with new contracting staff person.	Proactively managed the timeline while assisting new employee. Met in-person for pre-planning purposes and spent extra time and attention overseeing the process. Note this person left County employment while the bid was active and another new employee received extra assistance with creating the contract.

Value- Bid Saves Money
What Purchasing Did- Competitive Process allowed choice of low bidder
The Details- See Bid File for complete pricing information

GETTING STARTED – STEP 5 - ITB

- Sample Cost Releasing Savings for this Bid:

Total of four non-awarded bids / 4 = Average Bid
Average Bid – Low Bid = Savings

Total of four bids = \$2,068,503.00

Divided by four = \$ 517,125.75

*\$517,125.75 – \$483,475.00 = \$ **33,650.75***

Savings was spread out over 8 months = \$4,206/mo



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Multnomah County, OR
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Compliance

Measurement

Data Input

Projects & Efficiencies

Departments

Lead Buyers

Financial Period

Internal Objective

Paramotors

Suppliers

Customize

Total Efficiencies

Annual Project Report

Quarterly Project Repo

Annual Efficiency Rep

Quarterly Efficiency Re

Tools

New Project

New Efficiency

Refresh

Edit Project

4000002428 (1)
Psychological & Psychiatric Svs

4000002479 (1)
Multnomah Building East Roof Replacem

4000002405 (1)
Pavement Overlays 2014

GovDeals-6 (1)

Combined Gov Deals Sales

GovDeals Revenue -5 (1)

GovDeals

GovDeals Revenue - 4 (1)

GovDeals

4000002418 (1)
MB Water Repellent and Brick Repair

4000002417
Plumbing Supplies on a requirements bas

4000002283_1 (1)
Temporary Dental Staffing Services

4000002283
Dental Laboratory Services

4000002220
Refrigerator Replacement

GovDeals Revenue-3 (1)

GovDeals

4000002199 (1)
Generator Systems Maintenance

4000002177
Inhome care for Seniors

4000002031 (1)
Courier Svs on a Rqmts Basis

GovDeals Revenue-2 (1)

GovDeals

GovDeals Revenue (1)

GovDeals

4000002413
Runaway Youth Services

4000000000

Project Ref *

Project Title *

Project Description

High Level Objective

Internal Objective

Will project be periodically reviewed? *

Project type *

Department

Primary source of funds

Contracting Authority

Project category *

Previous contract value/list price

Current contract value

How was the previous contract value derived?

Project start date *

Project end date *

Efficiency Count

Total value of actual gains

Total value of expected gains

4000002405

Pavement Overlays 2014

Various locations asphalt paving projects for the summer construction period.

Providing Value

Other

☐ Yes ☒ No

Operating

DCS-Transportation Division

My Organization

My Organization

Highway Road Equipment, Materials, and R

517126

483475

Average of non-awarded bids-eng est.

May 2014

December 2014

1

33648

Displayed Gains: Actual

	January	February	March	April	May	June
2014	-	-	-	-	4206	4206
	July	August	September	October	November	December

Filter / Dataset

What?

Data Input

GETTING STARTED – STEP 5 – RFPs

- Request For Proposals
- Best Value selection does not lend itself to finding Cash releasing instances – often you don't select the lowest offer
- More likely to find non-cash releasing savings
- Example of one that did yield savings



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GETTING STARTED – STEP 5 – RFP



MULTNOMAH COUNTY OREGON REQUEST FOR PROPOSALS

RFP No: 4000001150



RFP Title: Energy Savings Performance Contracting

Issue Date:

December 14, 2012

Proposals Due: February 4, 2013

Not Later Than 4:00 PM

**LATE PROPOSALS SHALL NOT BE
CONSIDERED**

Refer Questions to:

Gerald E. Jelusich, CPPB

Phone: (503) 988-5111 Ext 24961

Email: gerald.e.jelusich@multco.us

Submit Proposals to:

Multnomah County Purchasing

501 SE Hawthorne Blvd, Suite 400

Portland, OR 97214

Pre-Proposal Conference:

**There will be a pre-proposal conference for this Solicitation at
9:00 AM on January 9, 2013 at Blanchard Education Service
Center Board Room, 401 N. Dixon St. Portland, OR 97227
Attendance is: Optional**



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GETTING STARTED – STEP 5 – RFP Cont

Procurement Value Summary

Procurement Title Energy Savings Performance Contracting

Procurement Number 4-1150

Award Date 2/14/2013

Lead Procurment Analyst Gerald Jelusich

Was this Previously Competed? No

AmerescoQuantum (Awd) \$47,304

Johnson Controls \$68,000

McKinstry \$65,435

Siemens \$61,200

Average of JC, M, S \$64,878

Difference between Bidder 1 and
Avg of Non-Awarded Bids \$17,574

Savings Period	One-Time	<input checked="" type="checkbox"/>
	5 Years	<input type="checkbox"/>
	Other	<input type="checkbox"/>

NOTE: AQ selected on basis of points earned, not sole cost.

GETTING STARTED – STEP 5 – RFP Cont

- Winning Proposer resulted in savings of \$17,574
- Calculation works like a bid
- Spread savings over three month study --
\$5858/Month



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Support

Data Input

Projects & Efficiencies

Departments

Lead Buyers

Financial Period

Internal Objective

Paramotors

Suppliers

Customize

Total Efficiencies

Annual Project Reports

Quarterly Project Reports

Annual Efficiency Reports

Quarterly Efficiency Reports

Tools

Projects & Efficiencies

New Project

New Efficiency

Refresh

Edit Efficiency

4000001462 (1)

Waitlist Intensive Case Management

4000001398 (1)

Lighting Efficiency Deferred Maintenance

4000001399 (1)

Lighting Efficiency Deferred Maintenance

4000001387 (1)

Multi-Disciplinary Teams (Mental Health)

4000001275 (2)

Jail Kiosk Systems

4000001070 (1)

Gresham Library Remodel - Phase II

4000001076 (1)

Sex Buyers Accountability and Diversio

4000001150 (1)

Energy Savings Performance Contractin

Energy Savings Performance

x4000000663 (1)

Bid- Halsey Street Reconstruction Project

x4000000505 (1)

Bid- 238th HEP (ODOT Recertification Pr

x4000000547 (1)

RFP- External Radiology Services

x4000000247 (1)

RFPQ- Licensed Clinical Staffing on a R

4000000023 (1)

RFP- Payment Processing System for D

xP12-10696 (1)

RFP- Law Enforcement Apparel & Equip

x4000000629 (1)

RFP- Federal Representation

x4000000358 (1)

RFP- UJ & JJC Detention Electronics Upg

Efficiency Description

inceptn review of five major buildings and provide recommendations to staff where energy savings could be realized.

Is this efficiency cash releasing? *

Yes

No

Gain Type *

Recurring

Is this efficiency collaborative? *

Yes

No

Did your organization lead? *

Yes

No

Who Benefitted?

My Organization

How was the efficiency achieved?

How Achieved *

Cost avoidance

Sub-category

Other Cost avoidance

Supplier

File Notes

Added: 27 Feb 2013 23:03, by Gerald Jelusich Ameresco Quantum selected contractor. Files in RIM under procurement document and related files.

Add Note

Lead Buyer

Jerry Jelusich

Efficiency create date

2/27/2013 10:09 PM

Last Edited Date

7/23/2014 2:44 PM

Last Edited By

Gerald Jelusich

January

February

March

April

May

June

2013

July

August

September

October

November

December

Displayed Gains:

Actual

Filter / Dataset

4000001150p_ValueA....pdf

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GETTING STARTED – STEP 5 - RFPQs

- Request For Programmatic Qualifications - RFPQ
- Similar to a RFP
- Create qualified “Pools” of vendors
- RFPQs do not carry any dollars – no promise of a contract
- Follow-on Allocation process



GETTING STARTED – STEP 5 – RFPQ Cont

- RFPQs are problematic
- Most get recorded without any savings
- Non–Cash Releasing Efficiency Example
 - *RFPQ featuring a savings through changes to our process.*



GETTING STARTED – STEP 5 - RFPQ



MULTNOMAH COUNTY OREGON

REQUEST FOR PROGRAMMATIC QUALIFICATIONS

RFPQ No: 4000002428



**RFPQ Title: Psychological and Psychiatric Services
on a Continuous Basis**

Initial Issue Date: May 9, 2014

Application Proposals Due: June 9, 2014
Not Later Than 4:00 PM
**LATE APPLICATION PROPOSALS SHALL
NOT BE CONSIDERED**


Refer Questions to:
Sherry Taylor
Phone: (503) 988-7549

Submit Application Proposals to:
Multnomah County Purchasing
501 SE Hawthorne Blvd, Suite 125

GETTING STARTED – STEP 5 – RFPQ Cont

MULTNOMAH COUNTY PURCHASING Value Added

Procurement Number: 4000002428
Procurement Title: Psychological and Psychiatric Services on a Continuing Basis
Award Date: June 16, 2014
Procurement Analyst: Sherry Taylor
Was this previously competed? Yes

Value	What Purchasing Did	The Details
IMPROVED PROGRAM/ PROCUREMENT RELATIONSHIP	We met with department and program staff and talked about how to handle this procurement. Out of that meeting we decided to only open annually as opposed to twice yearly. We also talked about the proposal process and how onerous it was for the Psychologists and Therapists providing services and decided to use an application instead.	Because the main qualifications for the Psychologists and Therapists are covered by their licensing process, and because most are sole-source vendors without paid staff, we decided to go with an application process. Worked closely with program and department staff to come up with an application that would cover the pertinent program needs where the score was self-evident by which box(es) they checked.
EASE OF SCORING 	Rather than have subjective criteria which requires a formal evaluation panel, the applicant checked boxes which were worth a specific amount of points. After adding their scores they were required to make 70% to qualify to move to the allocation process.	Verification of scoring was done by both Program Managers, the Department Contracts Specialist and myself. This process, for 7 applicants took less than an hour. The Program especially appreciated not having to form an evaluation panel and the simplicity of the process.

GETTING STARTED – STEP 5 – RFPQ Cont

- Non-Cash Releasing Value Calculation:

Typical Experience: 1 proposal per hour

7 Proposals x 4 Evaluators x \$30/hour/Evaluator

$7 \times 4 \times \$30 = \840 in expected evaluation costs

Actual cost was one hour at \$120, so we released back to the County \$720



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Data Input

Projects & Efficiencies

Departments
Lead Buyers
Financial Period
Internal Objective
Parameters
Suppliers
Customize

Total Efficiencies
Annual Project Reports
Quarterly Project Reports
Annual Efficiency Reports
Quarterly Efficiency Reports
Tools

New Project New Efficiency Refresh Edit Project

4000002428 (1)
Psychological & Psychiatric Svs
4000002428-1
4000002479 (1)
Multnomah Building East Roof Replacem
4000002405 (1)
Pavement Overlays 2014
GovDeals-6 (1)
Combined Gov Deals Sales
GovDeals Revenue -5 (1)
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4000002177
Inhome care for Seniors
4000002031 (1)
Courier Svs on a Rqmts Basis
GovDeals Revenue-2 (1)
GovDeals
GovDeals Revenue (1)

Project Ref * 4000002428
Project Title * Psychological & Psychiatric Svs
Project Description RFPQ using experimental application process
High Level Objective Providing Value ?
Internal Objective Other ?
Will project be periodically reviewed? * Yes No ?
Project type * Other ?
Department Dept of Community Justice
Primary source of funds My Organization
Contracting Authority My Organization
Project category * Personal Products, Equipment, and Service
Previous contract value/list price 0 ?
Current contract value 0 ?
How was the previous contract value derived? Not applicable - no funding with RFPQ
Project start date * July 2014
Project end date * June 2019
Efficiency Count 1
Total value of actual gains 720
Total value of expected gains

January February March April May June

Displayed Gains: Actual

Filter / Dataset

What? Data Input

4-2428rValueAdded.pdf

Show all downloads...

GETTING STARTED – STEP 5 – Other

- Other sources of Value Added Savings
 - *GovDeals – Surplus Sales of Equipment*
 - *Awarded Scholarships for Training*
 - *Awarded Grants and Stipends*
 - *Recovery of Business Income Tax*
 - *Recovery of owed fees/payments from other Government Agencies*
 - *Using discounts in buying volume training*



GETTING STARTED – STEP 5: GovDeals Surplus

- Received Notice from GovDeals Accounting:

----- Forwarded message -----

From: **GovDeals Accounting** <Accounting@govdeals.com>

Date: Thu, Apr 3, 2014 at 6:32 AM

Subject: ACH Payment - GovDeals, Inc. \$5,483.99

To: brian.r.smith@co.multnomah.or.us



An electronic payment (Payment #: EFT0000013918) has been sent to you in the amount of \$5,483.99 for the assets listed below:

Inventory ID	Asset ID	End Date	Paid Date	Picked Up	Sold \$	Tax \$	Add'l \$	Fee	Net
92	92	3/14/14 5:30 PM	3/15/14	3/26/14	\$460.00	\$0.00	\$0.00	-\$0.00	\$460.00
93	93	3/14/14 5:40 PM	3/19/14	3/26/14	\$4,605.00	\$0.00	\$0.00	-\$0.00	\$4,605.00
94	94	3/14/14 5:50 PM	3/14/14	3/26/14	\$60.00	\$0.00	\$0.00	-\$0.00	\$60.00
95	95	3/14/14 6:00 PM	3/14/14	3/26/14	\$358.99	\$0.00	\$0.00	-\$0.00	\$358.99

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Annual Project Reports

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Annual Efficiency Reports

Quarterly Efficiency Reports

Tools

Projects & Efficiencies

New Project

New Efficiency

Refresh

Edit Project

4000002428 (1)

Psychological & Psychiatric Svs

4000002479 (1)

Multnomah Building East Roof Replacem

4000002405 (1)

Pavement Overlays 2014

GovDeals-6 (1)

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GovDeals

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Dental Laboratory Services

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Refrigerator Replacement

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GovDeals

4000002199 (1)

Generator Systems Maintenance

4000002177

Inhome care for Seniors

4000002031 (1)

Courier Svs on a Rqmts Basis

GovDeals Revenue-2 (1)

GovDeals

GovDeals Revenue (1)

GovDeals

Project Title

GovDeals

Project Description

GovDeals revenue from sale of surplus items dated April 17, 2014

High Level Objective

Other

Internal Objective

Other

Will project be periodically reviewed? *

YesNo

Project type *

Other

Department

Non Departmental

Primary source of funds

My Organization

Contracting Authority

My Organization

Project category *

Hardware, Related Equipment, and Service:

Previous contract value/list price

0

Current contract value

5484

How was the previous contract value derived?

Revenue amount from 4 sales

Project start date *

April 2014

Project end date *

April 2014

Efficiency Count

1

Total value of actual gains

5484

Total value of expected gains

January

February

March

April

May

June

July

August

September

October

November

December

2014

What?

Data Input

Filter / Dataset

GovDealsNotice.pdf

20140723071855261.pdf

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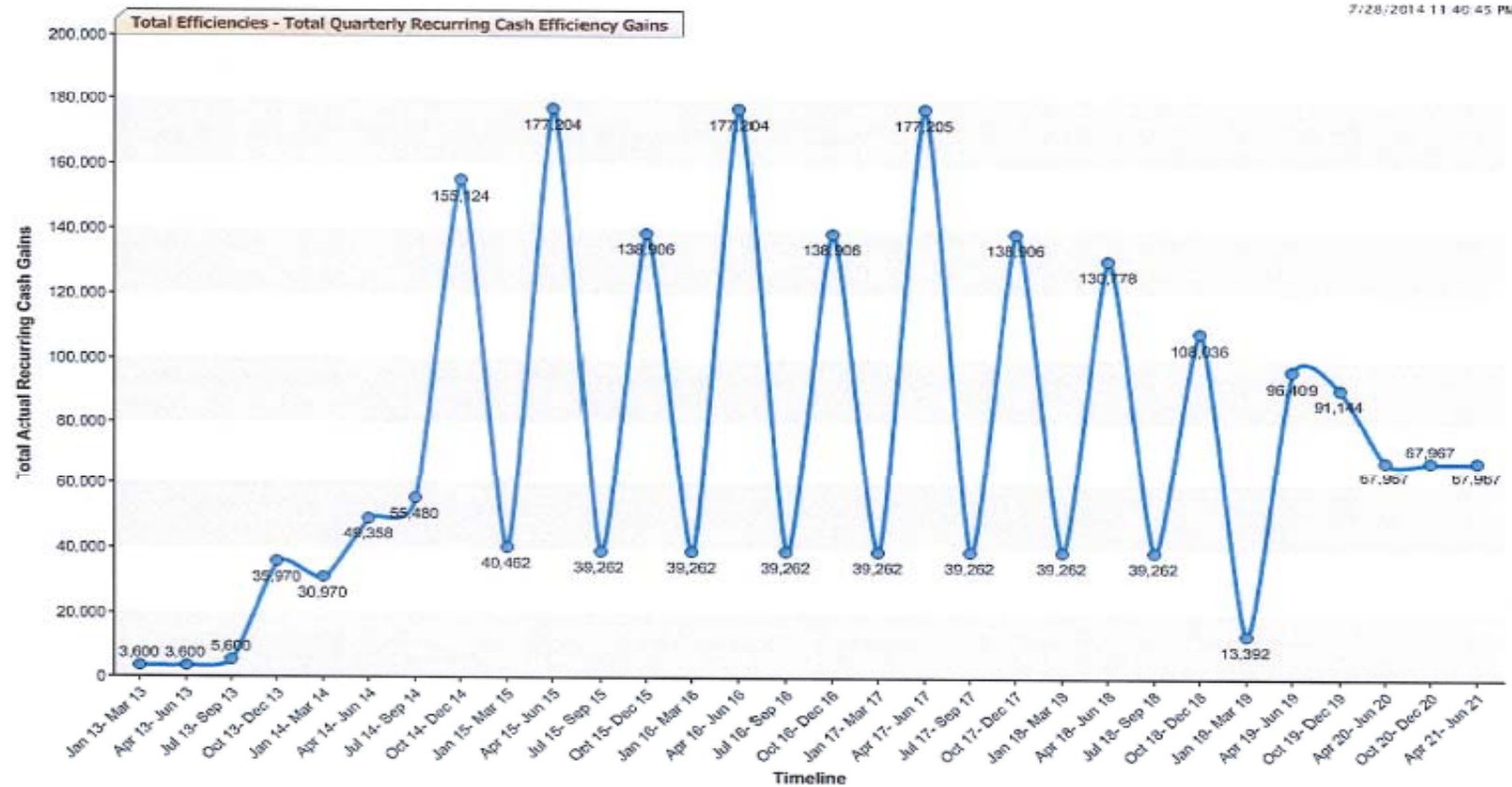
GETTING STARTED – Output



FY14 Profit and Loss Multnomah County Purchasing

How Achieved Type	How Achieved Sub-Type	Cash Releasing Value	Non-Cash Releasing Value	Total Value	Total Type Value
Added Value	Additional Items /Services	2,500.00	.00	2,500.00	
Added Value	Added Value - no Sub-Category Assigned	27,421.00	.00	27,421.00	
Added Value	Total Value of Added Value				29,921.00
Cost avoidance	Market Place Awareness	210,160.00	.00	210,160.00	
Cost avoidance	Other Cost avoidance	85,110.00	.00	85,110.00	
Cost avoidance	Cost avoidance - no Sub-Category Assigned	65,900.00	.00	65,900.00	
Cost avoidance	Total Value of Cost avoidance				361,170.00
Price Reduction	Other Price Reduction	29.00	.00	29.00	
Price Reduction	Price Difference	147,228.00	.00	147,228.00	
Price Reduction	Price Reduction - no Sub-Category Assigned	12,688.00	.00	12,688.00	
Price Reduction	Total Value of Price Reduction				159,945.00
Revenue Generation	Fees	14,400.00	.00	14,400.00	
Revenue Generation	Sale of Surplus Property	8,884.00	.00	8,884.00	
Revenue Generation	Total Value of Revenue Generation				23,284.00
Gross Profit	Gross Profit - Total Savings and Revenue Generation				574,320.00
Direct & Indirect Expenses	Personnel Services			-1,886,320.00	
Direct & Indirect Expenses	Contractual Services			-51,332.00	
Direct & Indirect Expenses	Materials and Supplies			-19,499.00	
Direct & Indirect Expenses	Total Expenses				-1,957,151.00
Net Profit	Net Profit (Savings) Contribution to bottom line				-1,382,831.00
Summary Metrics	Total annual spend on goods and services			665,634,263.00	
Summary Metrics	Total influenceable spend on goods and services			496,919,962.00	
Summary Metrics	Gross Profit (savings) on turnover			.09	
Summary Metrics	Gross Profit per Purchasing Employee			31,906.67	
Summary Metrics	Gross Profit per Professionally Certified Purchasing Employee			47,860.00	
Summary Metrics	Net Profit per Purchasing Employee			-76,823.94	
Summary Metrics	Net Profit per Professionally Certified Purchasing Employee			-115,235.92	

GETTING STARTED – Output



Spikes Cavell & Co
KNOW, KNOW, KNOW

Measure

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GETTING STARTED – Qualitative Output

- Database becomes central historical repository
- *Basis for annual reporting to Management team and Politicals*
- *Captures both Cash Releasing and Non-Cash Releasing Efficiencies*
- *Easy to Understand and Defend*



Wrapping Up

- *Areas needing further development:*
 - *RFPs – even if not cash releasing*
 - *Intermediate Procurements*
 - *Process improvements*
 - *Virtual Contracts and Cooperative Buying*



Lessons Learned

- *Start Simple*
- *Build some basic rules and stick to them*
- *Grow your program as you become familiar with the Software and how to take on new savings*
- *Use current processes to gather data*
- *If you need help – contact Spikes Cavell*



Further Assistance

- *Spikes Cavell – speak about Customer Service!*
- *NASPO – Natl Association of State Procurement Officials – standards for calculating value*
- *Budget Office*
- *Auditor*
- *Other*



THANK YOU

FOR YOUR PATIENCE,

FOR YOUR ATTENTION,

FOR NOT THROWING ANYTHING...



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