Source2Pay Project

Process – Post Execution Contract Management
Future State
Focus Group Meeting
May 2017
Agenda

- Welcome
- Introductions
- Current State Process Overview
- Current State Identified Issues
- Future State Recommendation
- Next in the project’s process
- Questions
Welcome!

- Introductions
  - Name
  - Department
  - Current Job
  - Goal for being participating on a Focus Group
Current State Overview

- Contract Execution
- Contract Monitoring
- Change Order
- Expiration of Contract
- Termination of Contract
Current State Categories of Issues

- Documentation – Issues related to lack of documentation
- Policy/Procedures – Issues related to Procurement Policies and Procedures
- Resources (Financial, Human) – Issues related to lack of sufficient staff or funding
- Technology – Issues related to system’s lack of functionality to support the process
- Training – Issues related to lack of understanding the process
Issues Identified:

* Changes (to the contract) are not communicated or documented
* Purchasing is left out of performance tracking
* No Evaluation or feedback from departments and no consistent place to document feedback
* Lack of communication about contract obligations
* Lack of an electronic system to document performance on contracts
* Lack of policy and procedure around how to handle BEP diversity goals, when findings could impact the contract
* Going above allowed dollar threshold without SPO approval for a change order
* The performance check documents and expiring reports are coming from multiple sources and not in one location
* Some departments are not monitoring or aware of the contract process
• Some departments are not monitoring or aware of the contract process

• Performing work not within scope due to departments not understanding the contract and/or the consequences

* Copies, details and milestones of contracts are not transferred to new staff
Recommendations

1. Comments In-box/Vendor Scorecard

2. Spreadsheet or summary of the most recent vendor performance and reviews
Recommendations

3. Post Execution Contract training/ Orientation activities which should include expectations of contract admins.

4. Make sure the OPD policy and procedures on the overall monitoring process is enforced.
Recommendations

5. Have one source for performance reports

6. New contract admin staff have access to procurement system
Recommendations

7. Offer hands on open forums/lab between purchasing & units (quarterly or semiannually)

8. Overall & targeted training (specific purchases like purchases with federal funds and on-boarding of new staff) on policies and process for dept and buyers
Your Input

- What are your recommendations?
Next Steps

- Present feedback to Project’s process Team
- Finalize future state
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Thank YOU!