

Source2Pay Project

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

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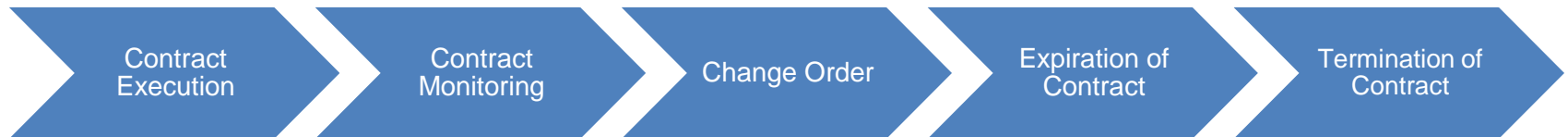
Agenda

- 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



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

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 - 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!