

WELCOME OC Procurement Alliance





OC Procurement Alliance Meeting

November 16, 2023

**Fullerton Community Center
340 West Commonwealth Ave
Fullerton, CA 92832**

Alliance Vision/Mission Statement



*To inspire growth and innovation
within the procurement community through
regional collaboration.*

Agenda



- I. Introductions/Icebreaker
- II. County Systems Update
- III. Supplier Engagement
- IV. County Cooperative Contracts Updates
- V. County Procurement Professionals Program Update
- VI. 2023 Goals Overview
- VII. Alliance Initiatives – Breakout
- VIII. CAPPO Training - The Ins and Outs of Hiring Consultants by Michael Kolodisner, CPPO
- IX. Open Forum

Next Meeting Location –TBD, February 22, 2024



County Systems

County Systems Update - OpenGov



- eBidding has been live since the end of June
- Supplier Engagement – Live since July
- Contract Management is now live
- Solicitation Development – Templates currently in development
- Reporting and Analytics – Set to rollout early next year
- Grant Management – Development of this module is underway, ETC early to mid next year
- Asset Management – Development of this module is underway, requirement collection sessions scheduled for December
- OpenGov and Pavilion collaboration making all County contracts included and fully searchable in both platforms
- Integrate Procurated – Yelp for Government Contracting



County Systems Update - DocuSign



- Enterprise License Agreement (ELA) to DocuSign
 - Unlimited number of users
 - Unlimited number of documents
 - Dedicated support team including a Customer Service Rep, Digital Transformation Consultant, and Trainer
 - 7 training sessions (e.g., Intro to Templates, Create and Manage PowerForms, Intro to Web Forms, etc.)
 - Launched countywide DocuSign website





Supplier Engagement

Supplier Engagement



➤ Focus of 23/24

- Establishment of County Team
- Surveys
- Supplier Focus Groups

➤ Outreach Efforts

- Chambers of Commerce
- SBA & Special Interest Groups
- Networking Events

➤ Supplier Outreach Event – SAVE THE DATE!

May 16, 2024 @ Mile Square Park

Please let us know of outreach opportunities in your areas:

helen.hernandez@ocgov.com or nicole.swain@ocgov.com



Vendor Information Day



- Monthly meetings alternating from in-person/virtual
 - various County Departments in attendance, Cities should come too
- Next Meeting:
 - December 7, 2023, 9am
- Future incorporation of Supplier Trainings (RFP process, Small Business Registration, etc)



Please contact Helen at Helen.hernandez@ocgov.com for registration information or scan code if you would like to join us.



County Cooperative Contracts

Countywide Cooperative Contracts



Upcoming Solicitations

- Towing Services
- Batteries
- Hazardous Waste Disposal Services
- Disaster Preparedness
- Public Safety Security Guard Services
- Legal Process Services
- American Sign Language Translation Services



Pavilion OC Contracts

Countywide Cooperative Contracts



New Contracts

- Landscaping Services
- Fire Extinguisher, Hose, and Maintenance
- Legal Notices & Public Awareness Advertising Placement Services
- Live Scan Digital Fingerprinting
- Fire Safety and Equipment and Safety Gear
- Alarm System Monitoring, Testing, and Maintenance Services
- Mailing Equipment, Supplies and Maintenance

Solicitations in Progress

- Credit Checks & Employment Background Screening Services
- Boarding Lodging Services
- Transportation Services
- Trash Pick Up Services
- Medical Staffing
- Medical Gases and Oxygen Supplies
- Courier Services
- Furniture Cleaning Services
- Athletic and Physical Education Supplies, Equipment
- Translation Services

Emergency Cooperative Contracts



- 35 Emergency Cooperative Contracts
- More categories will be added on an ongoing basis



EMERGENCY CONTRACTS SUBPAGE

Cooperative Suggestions

Nicholas Murray at Nicholas.Murray@ocgov.com



County Procurement Professionals Program

Training Calendar



Date	Time	Training	Where?
11/21/2023 11/28/2023 12/5/2023 12/12/2023	11:00AM-1:30PM	Better Projects, Better RFPs – Procurement U (NASPO)	Live Webinar Series
11/30/2023	10:00AM-12PM	Level Up – Elevating the Procurement Profession	Freedom Hall, Garden Grove
12/7/2023	9:00-10:30AM	Vendor Information Day	County Administration North Building
12/13/2023	2:00-3:30PM	Contract Policy Manual 2024	MS TEAMS
12/14/2023	10:00-11:30AM	Contract Policy Manual 2024	MS TEAMS
12/21/2023	10:00-11:00AM	Ask the RFP Doctor Web Series (Center4Procurement)	Zoom
1/04/2024	9:00-10:30AM	Vendor Information Day	Virtual
2/29/2024	TBD	OC Procurement Alliance	tbd
3/14/2024	TBD	Procurement Professionals Day	County Administration North Building

Procurement Excellence Network



The Procurement Excellence Network (PEN) is a community built by and for procurement professionals. With more than **1,000 members**, PEN offers free tools, trainings, and resources to help your government take its procurement practice to the next level. PEN's offerings include:

- ★ For **members only**, a community **discussion board** to share best practices and a **member directory** to facilitate connections

- ★ A growing library of specialized **how-to guides**, **templates**, and **publications** on subjects such as "Fostering Equitable Contract Outcomes," "Market Research: The Key to Your Next RFP's Success," and "Proposal Evaluation Tips & Tricks"
- ★ Opportunities for one-on-one **office hours** with GPL experts to workshop your jurisdiction's procurement challenges
- ★ Frequent **trainings** and **workshops** to help you refine your craft such as "Fresh Takes on IT Procurement," "Hiring and Retaining Staff to Build a Strong Procurement Team," and "Drafting Results-Driven RFPs"

And PEN is completely free. If you believe procurement can be a powerful tool for good and want to be inspired by others who believe the same, the **Procurement Excellence Network** is the place for you.

Become a member today.

[GPLPEN.HKS.HARVARD.EDU](https://gplpen.hks.harvard.edu)

BLAZEforward Mentorship Program

in partnership with NIGP



Professional Development

- Custom Profile Matching Database
- 6-month Program
- Short and Long-Term Goal Setting
- Career Advice
- Professional Development
- Pre-Generated Agendas
- Scheduling Assistance

Powered by
NIGP
Mentorship Program

Sign in to NIGP's Mentorship Program

Join to submit your profile and get access to mentorship opportunities at NIGP.

Sign In

Use your organization email address to sign in

Sign In

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Don't have an account? [Sign up](#)

For any questions, please contact
Nicole.Swain@ocgov.com

PROFESSIONAL DEVELOPMENT MENTORSHIP PROGRAM



6-Month Program
Goal setting
Professional Development
Custom Profile Matching Database
Pre-Generated Agendas & Scheduling

Sign up Now!



Prize for Alliance Member who can get the most sign-ups!



BLAZEforward Mentorship Program

in partnership with NIGP



Sign in to NIGP's Mentorship Program

Join to submit your profile and get access to mentorship opportunities at NIGP.

Sign In

Use your organization email address to sign in

Trouble signing in? Check out our support articles for logging in using [Single Sign-On](#) or [Email & Password](#)

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Don't have an account? [Sign up](#)

For any questions, please contact
Nicole.Swain@ocgov.com

BLAZEforward - County of Orange DPA Professional Development Mentoring Program



1-ON-1 MENTORSHIP

- Registration Open
- Pairing Open

About the program:

A 6-month program that meets 1-2 times a month to focus on short and long-term goal setting, career advice, or professional development.

Pairing Process:

Mentees will request a mentor. Mentors can review requests and accept or decline them.

Trailblazer Internship Program



- Collaboration with local Universities/Colleges
- Marketing the Opportunity (LinkedIn, Govjobs, College postings)
- Maintaining Internship Candidate Index with pre-interviewed and readily available Interns
- On-Boarding Support, we can help

If you're interested in an intern,
please reach out to Nicole Swain at nicole.swain@ocgov.com

TRAILBLAZING INTERNSHIP PROGRAM



Provide job skills & firsthand experience
Professional & Personal growth
Mentorship
Career Discovery

Apply Now



*Internship is unpaid



Procurement Professionals Day



Save the Date: March 14, 2024 (National Procurement Prof Month)

The event will include:

- Partner Booths for Professional Certification
- Trainings (The Power of LinkedIn & Critical Thinking, Inside and Outside the Box, and more)
- Mock Interviews & Resume Tips
- Professional Development Book Club Booth
- OC Learning & Organizational Development



Goals & Initiatives

Overview of 2023 Goals & Initiatives



Completed

- **Kicked off Alliance**
- **Created a website and shared platform for contract collaboration**
- **Created over 35 Emergency Cooperative Contracts and increased shareable contracts to 2400**
 - Solicited and uploaded 35 contracts, amendments, proof of publication and solicitation documents
- **Expanded Training and Mentorship Program to Alliance**
 - Offer DPA Training Program (including providing Alliance Meeting Trainings)
 - NIGP Mentorship Program, Internship Program, Procurement Professional Day
- **Other Collaboration Efforts:**
 - Incorporated CAPPO into Alliance
 - Alliance sharing of Best Practices (thresholds, policy & procedures, etc.)
- **Enhanced Supplier Engagement**
 - Annual Vendor Outreach Event
 - Supplier Presentations during Alliance Meetings
- **Created a regional database of Evaluation Panel members**
 - Extended County Compliance Support

In Progress

- **Local message board/online forum**
- **Onboarding training module for new hires**

Breakout Session – What Can the Alliance do for your organization

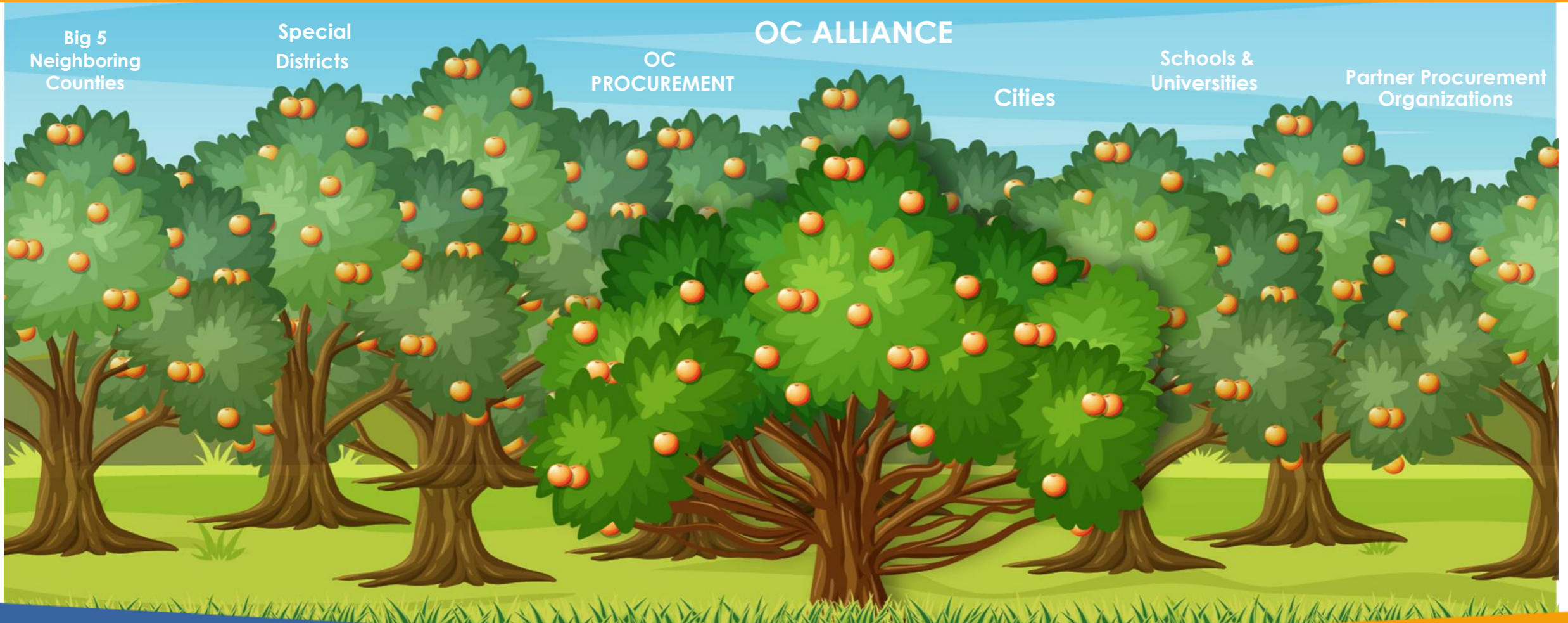


In groups of 4-5, focus on the following:

1. Since Alliance kick off in March 2022, what have you found to be most valuable from the Alliance?
2. Brainstorm Alliance goals for 2024 – what should the focus be for the upcoming year?



The Orange County tree is bountiful, But the Orange County Orchard is unstoppable.



Next Meeting



- Tentatively February 22, 2024
 - *Morning, or Afternoon Preferred?*
- Choose Location

Don't forget to follow the County's LinkedIn page for event updates, solicitations, employment opportunities, etc.

COUNTY PROCUREMENT OFFICE

County of Orange (Procurement)
Our Community. Our Commitment.
Government Administration · Santa Ana, California · 271 followers

Jacques works here · 4 employees

✓ Following Learn more More

Home My Company About **Posts** Jobs People Events

All Images Videos Articles Documents Ads

County of Orange (Procurement) 271 followers

NEW SOLICITATION: County of Orange seeks Mental Health Services Act Programming

Bid #RFP-017-2272402-CR - MENTAL HEALTH SERVICES ACT PROGRAMMING
County of Orange, CA CEO-County Procurement Office

Time left: 7 days, 22 hrs
Bid started: Jul 22, 2022 4:01:32 PM PDT
Bid ends: Aug 10, 2022 2:00:00 PM PDT

Register now for free!
Register for free to access Bid information and place offers on



Reminders

- Be sure to sign-in to receive your Continued Education certificate for today's training.
- Request for volunteers for help with photography!
- The 2024 CAPPO conference is being held in Palm Springs this year, from January 21 – 24th. Please RSVP and book/sign up now, as the event is filling up.





CAPPO Business

➤ Chapter Health:

- As of Monday, 11/6/23, the OC Chapter has \$3,268.79 in the bank.

➤ Chapter Updates:

- The Chapter currently has a Treasurer vacancy that is in the process of being filled.
- We are always looking for and taking volunteers!
- Chapter Pro-D and Co-Chairs are coordinating upcoming Chapter meetings & training and will announce via the webpage.



CAPPO Training

The Ins and Outs of Dealing with Consultants

Presenter: Michael Kolodisner, CPPO

Mike is a Certified Public Purchasing Officer who has won numerous awards including seven Excellence in Purchasing awards, two Distinguished Service Awards, and an Outstanding Agency Accreditation Award. Prior to his current position, he was the Chief Purchasing and Contracting Officer for the Metropolitan Water District of Southern California, the largest water agency in the United States. Before that he was Director of Administrative Services and Chief Purchasing Officer for Orange County, California. Mike has done training and consulting for both Fortune 500 Companies and Public Organizations throughout the United States, Canada, Europe, Asia, the Middle East and South America. Mike has a BA from the University of Maryland and has attended graduate school at George Washington University.



The Ins and Outs of Dealing with
Consultants

Mike Kolodisner, CPPO

mkolo@earthlink.net

949-510-6429

Why do we need Consultants?

- The organization has no expertise in the area where a consultant is required
 - The organization's attempt at meeting its own need was unsuccessful
 - The need is short term
 - There is a desire to get an outside perspective
 - The consultant can do work no one else wants to do
 - Outside expertise can lend credibility to a decision
- *107th Educational Conference*
 - Palm Springs, CA – Jan. 2024

Where are good places to get consultants?

Professional
associations –
CAPPO, NIGP

Colleagues

Universities

LinkedIn

Retired people

Finding the Right Consultant

- Be clear on the type of consultant you need
 - Short one time problem or long term assignment?
 - On-site or off-site?
- Does the consultant understand your business? Can they point to past accomplishments?
- Is the consultant a good listener?
- Can the consultant clearly explain concepts or is it “buzz” speak?

Tips on Making Consultants as Productive as Possible

-
- Make sure the consultant understands your organization
 - Monitor and evaluate the consultant's performance regularly
 - Have a good reporting structure
 - Communicate regularly
 - Have good, tangible criteria for judging the consultant's performance
 - Establish clear timelines

Negotiating a Consulting Contract

-
- Focus on outcomes
 - Include milestones
 - Be clear on all costs and fees
 - Incentivize for efficiency and effectiveness
 - Do research, know what good rates look like
 - Include the right to do regular audits

Consultant pricing

-
- Lump Sum (fixed price)
 - Hourly
 - Percentage contracts
 - Value based
 - Indefinite delivery contracts
 - Cost reimbursement contracts with fixed fee

Consultant Price Considerations

-
- What do they need to know?
 - technical expertise
 - professional expertise
 - legal matters

Lump Sum (or fixed price)

- A lump sum, also referred to as a flat fee or fixed price, is a type of payment that a consultant receives upon finishing a project. This option is usually the most straightforward one, as there are no hidden rates that the client must concern themselves with.
- Lump sums are good for short-term projects with the output clearly defined and with little risk of issues popping up. If the work tasks end up more complicated than expected, this may lead to heated discussions about changing the lump sum.

Hourly Rate

Hourly rates typically include overhead and profit. With hourly rates, you know exactly what you will be paying the consultant for, as you will pay for the number of hours.

Percentage Contract

Percentage Contract. These contracts are commonly used for architectural services. They may be also used for procurement and inspection agents. Percentage contracts directly relate the fees paid to the consultant to the estimated or actual project construction cost, or the cost of the goods procured or inspected. The contracts are negotiated on the basis of market norms for the services and/or estimated staff-month costs for the services, or competitively bid.

Performance or Value Based Remuneration

Contractor is paid based on performance.

EX: works on reducing costs and is paid based on a percentage of the savings.

Indefinite Delivery Contract

4.5 Indefinite Delivery Contract (Price Agreement). These contracts are used when organizations need to have “on call” specialized services to provide advice on a particular activity, the extent and timing of which cannot be defined in advance. These are commonly used to retain “advisers,” expert adjudicators for dispute resolution panels, institutional reforms, procurement advice, technical troubleshooting, and so forth, normally for a period of a year or more.

Cost reimbursement contracts

-
- Cost reimbursement contracts allow you to monitor and control consultant costs.
 - Ideal structure is re-imbusement for certain costs and a fixed fee for profit
 - Make sure you can distinguish between direct and indirect costs
 - Make sure you can monitor time spent
 - Deduct for any related services, goods or support you are providing
 - Have a place for price caps and unallowable costs

Things that must be covered in consulting contracts

- Description of services
- Fees and expenses
- Standards of performance
- Ownership of data
- Warranties and remedies
- Non-disclosure
- Errors and omissions
- Licenses and permits

The Consultant Contract

- Make the relationship between the parties clear
- Make it clear who owns any intellectual property
- Scope of Work: Describe in detail the specific services to be provided by the consultant.
- Have good indemnification statement
- Include non-disclosure and other confidentiality agreements
- A dispute resolution provision is a good idea

Consultant Red Flags

-
- Lack of transparency
 - Over-promising
 - Poor communication
 - Lack of References
 - Inadequate industry knowledge
 - High pressure tactics

Things to Look Out for

- Overbilling
- Overstating credentials
- Unnecessary services
- Lack of transparency
- Scope changes
- Stringing out services
- Ownership of intellectual property
- Conflicts of interest

Innovations in Consulting Services

-
- Use consultant to test and evaluate ideas developed by your organization
 - Develop a collaboration protocol
 - Embed the consultant in your organization

Some Uses for Procurement Consultants

-
- Oversee and help with solicitation process
 - Spend analysis
 - Train internal customers on using procurement processes
 - Negotiate prices savings
 - Evaluate contract performance
 - Analyze and improve procurement business processes

Monitoring Consultant Performance

- Develop key performance indicators (critical success factors)
- Identify areas where performance is falling short and develop a plan to correct it
- Make sure in-house people are benefiting by experiencing process improvements, learning new skills, and are driving positive change
- Measure KPI's against industry standards, or best practices.

Monitoring Performance

-
- Monitor consultant's activity and performance. Advise consultants of deficiencies in performance as they occur
 - Determine whether costs billed are representative of work performed.
 - Monitor consultant's expenditures. Make sure payments do not exceed maximum limiting amounts
 - Determine when extra work or a supplemental agreement is required.

Evaluating Performance

Exceptional 5 - Exceeds contract requirements. Cost-savings, added value, innovation, quality deliverables, consultant going above and beyond expectations

Exceeds Expectations 4 – Exceeds contract requirements, added value, innovation, consultant going above and beyond expectations

Meets expectations 3 – Meets contract requirements. Had some problems but corrective actions was taken. Problems have not been repetitive

Needs Improvement 2 – Does not meet some contractual, technical or professional requirements. Multiple of significant problems. Corrective action either not taken or unsatisfactory

Poor 1 – Does not meet contractual requirements. Recovery is unlikely. Serious problems persists and corrective action has been ineffective

Payment should be tied to performance

-
- Make sure payments are tied to milestones
 - Avoid open ended, hourly rate contracts
 - In some cases, retention should be part of the contract

Bad Contract, Good Relationship: Good Contract, Bad relationship

Communication is key

- Be clear on what you want the consultant to accomplish
- Have clearly defined responsibilities and goals
- A well-structured contract or job description can provide this foundational clarity, and a review together to talk through what success looks like
- Regular check-ins ensure that both sides understand these expectations and are aligned in their approach to meet them
- In a dynamic business environment, change is inevitable. The same holds true for all of life. When priorities shift or unforeseen challenges arise, both parties must be prepared to adapt.



**Wishing the Alliance a safe and
happy holiday season!**

Thank You!