



BEYOND BUYER

Sourcing & Contract Compliance

Faster Tools. Smarter Decisions. Better Results.

A joint publication from the Office of Contracting and Procurement and the Office of the Chief Technology Officer

Contracts Module Roll-Out

Working in contracting is demanding. There are decisions to manage, tasks to be tracked, and documents to be routed and signed. As promised, there is relief. The beginning of June brings the roll out of the Contracts Module—an automated tool to simplify contract specialist management of tasks. The Contracts Module contains checklists to ensure nothing is overlooked. No more triple checking to make sure all documents are signed and in place.

Many of the required documents, such as Determinations & Findings (D&F) will be approved directly in the system. Based on the system-configured business rules, the appropriate approval workflow is created. After the Sourcing Module is launched, even validating tax compliance with the Department of Employment Services (DOES) and the Office of Tax Revenue (OTR) will be automated. Other benefits you can expect to see with the contract module roll-out include:

- Removal of procurement staff in the approval flow when an item is purchased from a catalog;
- Automated assignment of a contract number with a link between the contract and solicitation numbers when the solicitation is created in the Sourcing Module;
- Nightly updates of contract award information pushed to OCP website;
- Advance system notification to alert contracting officers and contract specialists when contracts, option periods, and required insurance are expiring;
- Automatic expiration of con-

tracts when they reach their end date removing the ability for POs to be generated accidentally;

- Ability to track subcontractor information for a specific contract making it easier to verify compliance.

These are just a few of the features of the Contracts Module. Want to learn about all the features? Go to DCpedia page, <http://wiki.in.dc.gov/index.php/Category:OCP> for all the latest information.

Stakeholder Spotlight: Angela Turner, OPIC (Office of Procurement Integrity and Compliance)

There's a new compliance advocate in OCP. Since March of this year, Angela Turner has watched and monitored contract activity. She assumed this position after spending 21 years in contracts, previously as a contracting officer. It's a natural evolution for Angela to transition from contract issuance to contract compliance which she views as a full circle operation. She is delighted to have experienced both sides of contracting and welcomes the introduction of the Sourcing and Contract Modules. When Angela started in

contracting 21 years ago, she worked for the Fire Department and all contract work was performed manually. Since joining OCP seven years ago, Angela has witnessed the introduction of PASS and is excited at the prospect of having all sourcing and contract work completed electronically. She sees the transition to electronic systems streamlining procurement, eliminating errors, and enabling the tracking of contract compliance. These enhancements are a big plus toward continuous improvement in

the contracting cycle. One day, Angela thinks she will return to the role of a contracting officer. Until that time, she will continue to monitor contracts using the Contracts Module. The streamlined processes will afford her more time to spend with her two adorable sons, Lealand (9) and Adison (8), as well as collecting the Asian Art she is passionate about. She also creates her own works of art with her handmade crafts.



Angela Turner
Contract Compliance

From One of Our Change Champions:

The flexibility that I have seen demonstrated by the soon to be released Contract Compliance Module and the information about the Sourcing Module appear to successfully match the needs of an agency with independent procurement authority, providing the ability to create our own methodology for the issuance of solicitations that result in contracts.

*Samuel J. Feinberg CPPO, CPPB
Department of Mental Health
Director, Contracts and Procurement
Agency Chief Contracting Officer*

Catalogs are Coming Back!

Get trained on "How to Order from a Contract". Webinars offered every day beginning week of June 14. Look for the announcement on how to attend during the week of June 7.



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A Word from the Chief Procurement Officer

This is an exciting time. On June 7th, the Contracts Module will go live, substantially enhancing the way we here in OCP conduct our business. It will introduce a level of transparency that is not currently available by providing a District-wide repository for contracts. All information for a contract will be stored in a single system, easily accessible for reviewing and auditing. But more importantly, the introduction of this module is an investment in our overall success.

Change occurs because someone sees a better way of doing something and takes the initiative to sponsor and communicate this idea. I want

to personally invite each of you involved in the adoption of the Contract Module to voice your ideas and provide recommendations to ensure we are operating efficiently, and getting the maximum benefit from this new technological capability. Whenever a new system or application is launched, and is suddenly being used on a daily basis (as opposed to the planning and testing that precedes launch), there are some adjustments that need to be made. No one knows what issues will arise, and no one but you – who are using this new module on a daily basis - can bring forward concerns or recommendations that will make this a smoother transition. I am empowering you to not accept things that are clumsy or ineffective, but to let us know if you see better ways of work-

ing with this new application, so that we can discuss and implement any beneficial changes. If you feel you are not being heard, feel free to email or telephone me with your suggestions. I can be reached at david.gragan@dc.gov or 202-724-4242. I will ensure that our Ariba partners and our OCP leadership looks into all recommendations from the procurement staff, our contracting officers and specialists, that we are all here to serve. Let's embrace this change together and make it work.

What to Expect from Sourcing

Once a requisitioner makes a decision to purchase goods or services and secures the funding, the Office of Contract and Procurement (OCP) determines the type of procurement needed, identifies if anomalies exist, selects vendors, publishes the offer, and awards the contract. The whole process is referred to as 'Sourcing'. With the upcoming roll-out of the Sourcing Module, issuing a solicitation becomes automated, simplified, and easier to audit.

The Sourcing module includes the following procurement processes: gathering require-

ments, creating the solicitation, and making the award to the winning vendor. The Sourcing Module is designed to streamline the solicitation processes, enabling the OCP team to deliver high-quality solicitations with OCP-wide visibility across all procurements.

In addition to reducing the time required to produce and release a solicitation, Sourcing brings simplification of processes. For example, contract specialists no longer have to physically create Determinations and Findings (D&Fs) or draft new solicitation language. The Sourcing

Module offers electronic D&F approvals and a library for housing all standard solicitation language. Factors such as the dollar amount or market type (i.e., set aside or open) drive the selection of available solicitation templates, ensuring accuracy, consistency, and compliance.

Acquiring signatures is streamlined. The Sourcing Module is configured to automatically create an approval flow for every solicitation. The contract specialist is able to view approvals as completed. Once all approvals are received, an email notification is sent to the contract specialist to notify that all approvals are complete. Sourcing provides immediate, direct tracking of all approvals.

Pilot Training Kick-Off

As the June 7 GO LIVE date for roll out of the contracts module quickly approaches one of the many tasks undertaken is testing of the training. Pilot training occurred Thursday,

May 20. Participating in the Pilot Training were experienced PASS users, OCP technical leads, and contract specialists. The training explored usefulness of topics, detail of instruction, and relevance of material. The overall recommen-

dation was excellent! To ensure your seat in the upcoming training, see the schedule posted to this newsletter or visit http://ocpapps.in.dc.gov/train/online_form.asp.

Sourcing and Contract Compliance

Leadership Team:

David P. Gragan, Chief Procurement Officer
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Mark Hamlin, Senior Director
Ellie Gutilla, Project Manager
Divyanshu Arya, Functional Lead
Anup K. Hiranandani, Technical Lead
Elizabeth Johnson, Change Management Lead
Ken Lewis, Training Lead

Upcoming Events

Contract Module GO LIVE!!!! It has finally arrived. Contracts officially becomes available on June 7.

PASS User Forum: The next PASS User Forum is scheduled for June 22. At this event the Ariba team will provide highlights of the changes to Analysis, demonstrate how to access and make purchases from catalogs, and answer your questions on the Sourcing and Contracts Modules. Watch for the email to secure your reservation.



Participants at Pilot Training