

NCCSD Systems Modernization Committee

Systems Modernization States Lessons Learned Webinars

Procurement – 10/15/2021

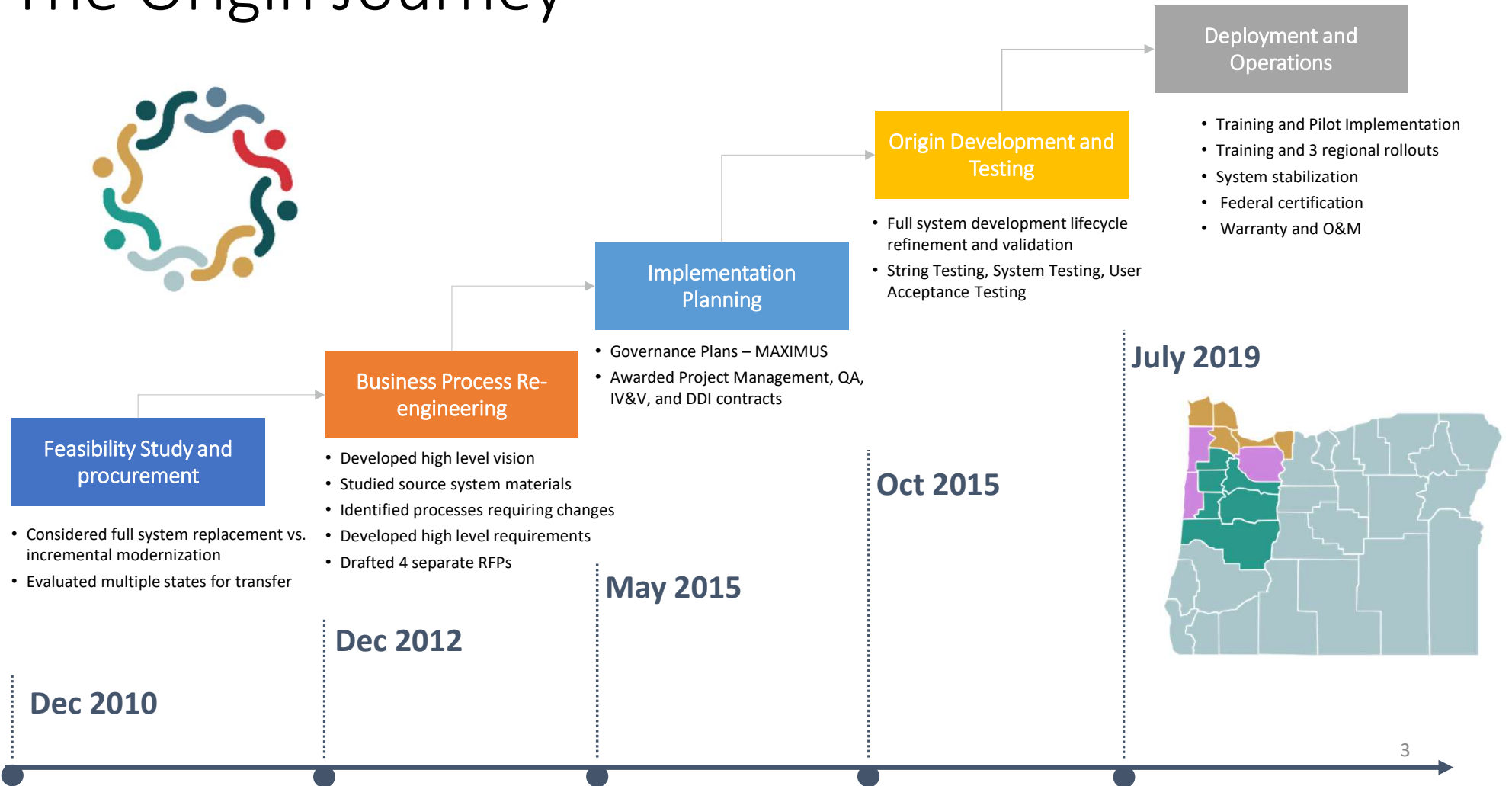
OREGON

Karen Coleman
Business & Technical Services Chief
Oregon Department of Justice
Division of Child Support
Karen.Coleman@doj.state.or.us

Oregon Child Support Program

- Oregon Department of Justice Division of Child Support
- State administered and state operated program
 - 22 of the 36 counties contract with DOJ to provide some services
- Current caseload – approximately 160,000
- Oregon's history with large technology project prompted new processes and requirements
 - Independent Quality Assurance
 - Stage Gate Process
 - Oversight by Enterprise Information Services (office of the State CIO) and Legislative Fiscal Office

The Origin Journey



Procurement Approach

- How did you procure for each type of vendor identified as needed?
 - Project Management Services Contract – RFP
 - Included Organizational Change Management and staff augmentation
 - Quality Assurance Contract – RFP using State’s pre-approved vendor list
 - Independent Verification and Validation Contract – RFP
 - Design, Development, and Implementation Contract – RFP
 - Included Training – user training and onsite support during implementation, and technical training and knowledge transfer for technology staff

Procurement – Document Development & Evaluation

- State procurement rules – format, evaluation, and Best and Final Offer (BAFO) strategy
 - Who, When, How?
- Document development – Resources
 - Drafting
 - Review
 - Scoring



Procurement – Document Development & Evaluation - continued

- What rules were applied in Oregon?
 - Cost proposals – Firm fixed priced
 - No off-shore work permitted – All staff onsite
- Respondent reference documents – Procurement Services office
- Vendor demonstrations – Yes, for finalists
- Vendor assistance with procurement process – Yes, in part

Procurement – Contract Development and Negotiations

- Rules for contract negotiations
 - When and how to get up to speed on rules? – As early as possible. It helps to be directly involved to increase knowledge and understanding
 - Who's responsible for process? – Oregon Department of Administrative Services (DAS), Procurement Services and the Oregon Department of Justice
- Who needs to be involved and informed?
 - DAS Procurement Services
 - Oregon Department of Justice, Business Transactions Section
 - Oregon Child Support Program
 - DAS Enterprise Information Services
 - Oregon Legislative Fiscal Office

Procurement – Contract Development and Negotiations - continued

- Key components included in contracts
 - Oregon's contract template
 - Definitions
 - Compensation
 - Ownership and License in Deliverables
 - Confidentiality and Non-Disclosure
 - Contractor's Responsibilities
 - Limitation of Liability
 - Indemnities
 - Events and Remedies for Default
 - Termination and Transition Services
 - Independent Contractor Taxes and Withholding
 - Dispute Resolution
 - Insurance Requirements
 - Federal Terms and Conditions

Procurement – Contract Development and Negotiations - continued

- Key components included in contracts
 - DDI Contract – components
 - Define Defect Levels
 - Service Level Agreements – Performance Standards – Liquidated Damages
 - Federal Tax Information (FTI) Security
 - Testing requirements
 - Production Pilot requirements
 - System Stabilization Period
 - Final Acceptance Criteria
 - Warranty Services
- Who managed the contracts? – Project Executive

Procurement – OCSE Review and Approval

- Plan for OCSE review and approval
 - Review State Systems APD Guide – Available on OCSE website
 - Consistently allowed 60 days
- Strategy for involving OCSE
 - Provided regular updates
 - Notification prior to submitting documents for review/approval
- Were there any surprises? – Fortunately, no

