# Ohio Fiscal Academy

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# FOR THE RECORD:
# AGENCY PURCHASING REQUEST FORM (APR)

# EXECUTIVE SUMMARY

- Over 230 million dollars spent on Supplies, Materials, and Minor Expenses in fiscal year 2017.
- Necessity to have a standardized and easy-to-use APR form that will cut across the entire State of Ohio agencies.
  - Includes minimum fields/requirements necessary to process.
  - Accessible to ALL employees.
  - Increase efficiency from need to product delivered.
- Reduction in the time used in locating a point of contact to ensure purchase gets taken care of.

# PROBLEM STATEMENT

- Inconsistencies in how State agencies process business transactions.
- Current forms used by agencies are NOT user friendly.
- Results might be the same, but approaches are vastly different.
- Need to educate users on how to use.
- Need to tackle challenges that grow with daily business operation.

# BACKGROUND

- Betsy Bashore, Chief of Value Management Office, OBM.
- Joe Banicki, Agency Engagement Center, OIT, OAKS, DAS.
- DAS 'Quick Wins' team, highly experienced professionals in Information Technology (IT) and Procurement.
  - ✓ Several Projects: APR Form, OIT Release & Permit Form, Buyers Portal, Debarment Process, Complaint to Vendor, and Vendor Verification Form.
- Focus on creating an Agency Purchasing Request Form (APR).
  - ✓ No current standard/universal form.
  - ✓ Compare current agency similarities/differences.

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# STRATEGIES

1. **What is the purchasing process for your agency from start to finish? Are there any issues? Please explain?**
2. **How much paper is involved in your agencies current purchasing process?**
3. **What would you like to see on an electronic purchasing form?**
   a) **Please rank the following fields as High, Medium, or Low importance:**

   i. **Quantity**
   ii. **Cost**
   iii. **Item Description**
   iv. **Reason / Justification**
   v. **Is This Item on Contract?**
   vi. **Is It Budgeted?**
   vii. **Ship To?**
   viii. **Suggested Vendor?**
   ix. **Other _____**

# FINDINGS

- Nearly 5,000 employees
- Full-service facilities in every county
- 12 District Offices
- One (1) Central Finance Office
  - Oversight & guidance of Departmental activities

# PROCESS

- Central Finance Office is final authority.
- Initiated by Requestor of each respective district.
- Central Finance Office creates voucher, and generates payment to vendor.
- Obstacles include Decentralization.
- Considerable paper still involved in procurement process.

- QUANTITY
- COST
- ITEM DESCRIPTION
- REASON / JUSTIFICATION
- IS ITEM ON CONTRACT

- IS IT BUDGETED

- SHIP TO
- OTHER:  BILL TO

- Nearly 4,000 employees
- Six Divisions:
  1. Ohio State Highway Patrol
  2. Bureau of Motor Vehicles
  3. Homeland Security
  4. Emergency Management Agency
  5. Emergency Medical Services
  6. Office of Criminal Justice Services

# PROCESS

- Utilizes OAKS on the front end of the purchasing process.
- Initiated by Requestor, to handle division requests.
- Enter necessary data into OAKS.
- Requires knowledge of OAKS to process request.
  - Potential barrier to ‘Joe the Plumber’ or ‘Matt the Maintenance Man’.
- Considerable paper still involved in procurement process.

- QUANTITY
- UNIT PRICE
- ITEM DESCRIPTION
- UNIT OF MEASURE
- CATEGORY

- N/A

- N/A

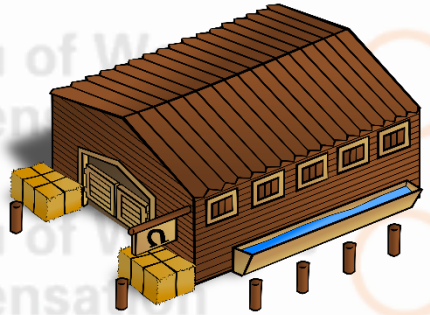
# PROCESS

- One page Requisition Form (7 field areas) filled out.
  - Routed to management.
  - Finalized at Central Office.
- Central Office has a “Stock Room”.
  - Stock Request Form filled out.
- Concerns:
  1. Lack of communication
  2. Uncertainty with requests
  3. Promptness
- Physical Paper: “paper light” motto.

- QUANTITY
- REASON / JUSTIFICATION
- SHIP TO ADDRESS
- IS ITEM ON CONTRACT

- COST
- IS IT BUDGETED
- SUGGESTED VENDOR

- ITEM DESCRIPTION



# PROCESS

- Centralized procurement function.
- All requests have dedicated email Inbox or SharePoint Site.
- P-Card heavily utilized for basic purchases.
  - Inventory team deliveries statewide were reduced.
- Pain Points:
  1. Timeliness, especially infrequent items.
  2. Lack of proper notification for purchase needs.
- Still more paper than is desirable.

- QUANTITY
- ITEM DESCRIPTION
- REASON / JUSTIFICATION

- SHIP TO

- COST
- IS ITEM ON CONTRACT
- IS IT BUDGETED
- SUGGESTED VENDOR

Ohio
Department of Health

- ODH → Cabinet level agency
- Director reports to Governor
  - Serves as member of Executive Branch
  - Responsive to Ohio's 11.5 Million residents

# PROCESS

- Procurement consists of 2 units:
  1. Purchasing
  2. Contracting
- Requests submitted using agency Workflow System (WISE).
  - Does not tie into OAKS.
- Transitioned the process from manual to electronic.

- QUANTITY
- SUGGESTED VENDOR
- ITEM DESCRIPTION
- COST
- SHIP TO

- N/A

- REQUESTER
- SPECIFICATION
- FUNDING SOURCE

Ohio | Department of Developmental Disabilities

- Develops service to ensure individual's health and safety
- Oversees a statewide system of support and service for those with Developmental Disabilities
- Provides support from early childhood through adulthood

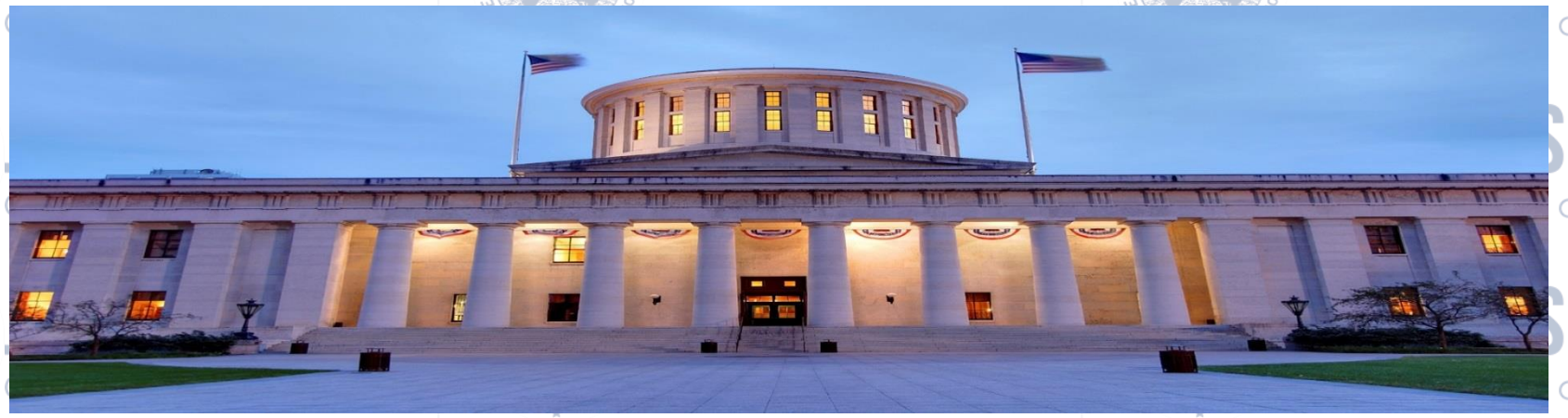
# PROCESS

- DODD RTP is completed in two different formats:
  1. If the RTP has the bid specification and the bids attached.
  2. If procurement receives a RTP with specifications only.
- DAS procurement protocol is followed.
- Procurement process completed Outside of OAKS.
- Department tries to minimize amount of paper involved.

- QUANTITY
- SUGGESTED VENDOR
- ITEM DESCRIPTION
- IS ITEM ON CONTRACT
- REASON / JUSTIFICATION

- N/A

- CONTRACT NUMBER
- SOLE SOURCE (Y/N)
- OAKS ID NUMBER



- **Responsible for:**
  1. Overseeing Elections and registering business entities (corporations, etc.)
  2. Granting them authority to do business within the state
  3. Register secured transactions
  4. Granting access to public documents
- **140 employees**
- **Located in Downtown Columbus**

# PROCESS

- 3 Procurement forms:
  1. Information technology goods and services.
  2. Printing goods and services.
  3. Other general goods and services.
- ***Only*** Procurement officer enters information/orders item(s).
- Requires OAKS Financial knowledge to complete process.
- Considerable amount of paperwork involved.
- Keep paper copies, yet also save documentation electronically.

- QUANTITY
- ITEM DESCRIPTION
- REASON / JUSTIFICATION

- SUGGESTED VENDOR

- SHIP TO

CONCLUSION

CONCLUSION

CONCLUSION

NOT RECOMMENDED

RECOMMENDED