**Oregon**

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# MEMORANDUM

**To:**       Alex Pettit, State Chief Information Officer (State CIO)
**From:**     Ed Arabas, Lead Senior Operations & Policy Analyst
**Date:**     February 2, 2016
**Subject:**  Oregon Department of Forestry (ODF) e-Procurement Project Stage Gate 2
             Approval

## BACKGROUND

As noted in the Stage Gate 1 Approval Memorandum (dated September 23, 2015), ODF is participating in a multi-agency project designed to procure and implement an end-to-end electronic procurement solution for collaborating agencies within the Executive Branch. The project, called OregonBuys, currently involves nine (9) state agencies including the Department of Administrative Services (DAS, the agency responsible for the Oregon Procurement Information Network (ORPIN) system). Several Stage 2 activities were prescribed in that memo, specifically related to project management artifacts, prior to requesting Stage Gate 2 endorsement. ODF has provided the following project artifacts to the OSCIO:

1. Executed Charter (dated 10/27/15)
2. Procurement System Bus Case Update (v.2.0, dated 01/25/16)
3. Project Plan (containing scope statement, dated 01/08/16)
4. Task 2 – Initial Assessment Report (dated 1/21/16)
5. Initial Solution Requirements Analysis (dated 1/13/16) and OregonBuysReqtsDoc_05 (draft detailed requirements, dated 1/29/16)
6. e-Procurement Timeline and budget estimates (dated 1/29/16)
7. Work Order contracts for consulting services related to project management and internal controls

## DISCUSSION

ODF continues to be a part of a multi-agency effort to identify and contract for an end-to-end electronic procurement solution via the establishment of a Statewide Price Agreement. This procurement will enable ODF (and collaborating agencies) to use the selected vendor contract to replace their existing procurement processes with the e-Procurement solution, in a streamlined manner, by providing the cost, timeline, and project management artifacts required in Stage 3 to the OSCIO. Each collaborating agency will need to conduct detailed planning and meet the due diligence requirements set out for Stage Gate 3 endorsement for its own agency-specific project. ODF has satisfied the requisite document development efforts outlined in the Stage Gate 1 memorandum, and continues to develop specific procurement documentation on behalf of its own needs and those of the collaborating agencies.

## RECOMMENDATION

Approve the project through Stage Gate 2, including approval to release a Request For Proposals (RFP) for the e-Procurement Project, with the following conditions:

(1) ODF will continue to use qualified project management services for the duration of the project;

(2) ODF will appropriately contract for independent quality assurance (QA) services for the ODF version of the e-Procurement Project (Oregon Buys). At minimum, authorized QA services will include an initial risk assessment, quality control (QC) review of the ODF project plan and other foundational project management documents, and ongoing, independent quality assurance services throughout the project's execution. All QA/QC deliverables will be reviewed by the OSCIO and Legislative Fiscal Office (LFO);

(3) Prior to executing any contracted solution to support the e-Procurement Project, the project's detailed project management artifacts and the selected vendor's Statement of Work will be reviewed and approved by the OSCIO and LFO (in alignment with the Joint Stage Gate Review process);

(4) Prior to executing any contracted solution to support the e-Procurement Project, an updated business case (containing updated project cost information) and updated foundational project management documents will be provided to the OSCIO and LFO for Stage Gate 3 review and approval/endorsement;

(5) ODF must continue to maintain open communications with the OSCIO concerning the progress of the e-Procurement Project, including regular status reporting and risk/issue tracking, and must utilize the OSCIO's enterprise Portfolio and Project Management system once it is deployed for enterprise use.


Analysis prepared by: _Edward P. Arabas. II_ Date: _2/2/2016_


Analysis approved by: _____ Date: _2/2/2016_