OKLAHOMA
Office of Management
& Enterprise Services

OMES Information Services Supplier Bootcamp

OMES IS strategic supplier contacts

Strategic Alliance Management	sam@omes.ok.gov
Glenda Caudle	glenda.caudle@omes.ok.gov
Carissa Terry	carissa.terry@omes.ok.gov

Bootcamp agenda + outcomes

Supplier management overview

Information on IS' supplier management program.
Outcome: Understand our vision for strengthening partnerships with the goal of moving the state's technology forward.

Navigating OMES' processes

Highlight OMES' processes for technology suppliers.
Outcome: understand expectations in order to maximize your partnership with the state.

Resources

Detail the various resources available for technology suppliers.
Outcome: understand how to navigate OMES IS' supplier processes and ensure we help achieve our customers' requirements for relevant, affordable and capable products and services.

Q&A.

Engagement

Type your questions in the chat.
We will answer the questions via chat throughout the session.

Or, mic in during Q&A at the end.
If you choose to mic in, please be sure to wait until the designated Q&A portion of the meeting.

Resources will be posted after the meeting.
The slide deck and recording will be posted on Oklahoma.gov/projects following today's session.

OMES IS overview

OMES IS exists to serve our agencies and citizens' needs, from implementing more modern technology to assisting with day-to-day troubleshooting to bigger strategic projects.

We offer shared technology services to 111+ agencies, boards and commissions and rely on our supplier community to help increase IS' impact on our state.

557

IT experts.

36,900

Devices managed daily.

300

Projects completed in 2021.

Doing business with Oklahoma

Resources
OMES Central Purchasing has curated key information to get you started with the state on this [Doing Business with Oklahoma](#) resource page.

FAQs
Find answers to CP's most frequently asked questions [here](#).

Bonus:
The state hosts an annual Supplier Expo which is a great way to learn more about our strategic direction. [Click here](#) to learn more.

Supplier management goals + objectives

Goals	Objectives
Advocate for capturing the value created by our supply-chain functions.	Manage and reduce spending across IT.
Implement a continual feedback loop.	Continually mature our partnerships.
Realize statewide efficiencies.	Improve the support of our relationships.
Maximize value across critical suppliers and minimize risk.	Drive continuous improvement in the supplier's behavior and performance.
Support Oklahoma's growth.	Encourage the state's suppliers to advance Oklahoma's innovation and success.

IS supplier engagement plan

Upcoming opportunities:

- Quarterly all new and existing supplier sessions.
- Domain meetings: a chance for you to hear directly from our teams about their pieces of the [Reference Architecture](#), ask questions and learn more about our strategic direction.
- Quarterly review + 360° performance scorecard evaluations.
- October 11, 2022: Technology supplier breakouts during the State Supplier Expo and more.

OMES IS reference architecture

The OMES IS Reference Architecture (RA) is the strategic map for the state's technology solutions. All proposed solutions must align with the state's RA.

RA highlights:

▶ Engage supplier management and/or your IS Point of Contact to begin discussions on our RA and your products and services to ensure alignment.

▶ To get on the RA, your solution must fill a gap on the RA or address an area where the state doesn't have a standard or a well-defined solution.

RA tips:

▶ Clearly define where your company may be a best fit.

▶ If a solution you intend to present is a duplicative technology, as the supplier, you must address why we should have two solutions in the box.

IT standards

> **Background**
> The CIO has statutory authority to issue [technology standards](#) for the state to ensure security, supportability, economies of scale and alignment with the RA.

- New standards are posted regularly.
- The capability to enforce against standards ensures that the state is approaching technology at an enterprise level while keeping security, innovation and long-term support top of mind.

Getting started

Basics

- Suppliers are required to renew registration annually.
- You should contact your Agency Buyer to notify the state of any changes to your tax identification number, name, address or additional business information.
- You should provide an updated W-9, Secretary of State, Oklahoma Tax Commission and Workman's Compensation Certification annually.

Vendor registration

Vendors who are registered in the OMES supplier registration system will receive automatic notices of solicitations that are issued in the same commodity code as the supplier is registered.

Coming soon: a new self-service eSupplier portal!

IT solicitations

You are encouraged to regularly check our IT solicitations page for opportunities to bid.

IT procurement thresholds

< $25,000

Fair and reasonable.

> $25,000.01

Bid out to 10 registered suppliers.

> $50,000.01

Bid out to all registered suppliers in that category code unless on a statewide contract.

>Note: The CIO reviews and approves all IT purchases at a zero-dollar threshold.

Statewide contracts

❯ What are statewide contracts?

- Statewide contracts are indefinite delivery, indefinite quantity (IDIQ) contracts provide for an indefinite quantity of services for a fixed time. They are used when the state can't determine, above a specified minimum, the precise quantities of supplies or services that will be required during the contract period. IDIQs help streamline the contract process and speed up service delivery.

Admin fees and reporting

Admin fees

- The administrative fee is to be paid by the supplier to OMES based on the dollar value of all sales to customers pursuant to the contract. (Example: if the fee is one percent (1%) for sales totaling $100,000 the fee will be $1,000.).
- Usage is calculated on the amount the supplier has invoiced and received payment on during the quarter.
- The remittance amount is calculated on the quarterly usage report and remitted to OMES.

Contract usage reports

- Reports provide the total dollar amounts sold to all state agencies and authorized affiliates whether done by P-Card or Purchase Order. Failure to provide reports may result in cancellation or suspension of the contract.
- Reports are submitted electronically on a provided template and sent to strategic.sourcing@omes.ok.gov.
- Reports are submitted quarterly, regardless of usage, and are due within 45 calendar days after the close of each quarter:
  - January 1—March 31, April 1—June 30, July 1—September 30 and October 1—December 31.

Renewals and extensions

Contract renewals and extensions

Renewals
- Notices of intent to renew are sent no less than 30 days prior to renewal date.
- Ability to renegotiate price and products but terms are no longer negotiable.

Extensions
- No less than 30 days prior but can vary depending on the contract.

Quotes

Quote basics

- Quotes cannot be greater than 2 decimals out (causes rounding issues as our system only accepts 2 decimals).
- If the quote is against a statewide contract, it must reference that contract number (Example: SW1012).
- Quotes need to be valid for a minimum of 30 days to allow for proper approval of a request.
- Ensure that **all** costs are on the quote, including shipping/freight for accuracy.
- Include a valid and current remit address.

Invoices

Invoicing basics

- Invoicing should match the quote as OMES sets our PO up to match the quote.
- Suppliers should receive a copy of the OMES PO for the fully agreed-upon amount before commencing labor for a project.
- The OMES PO number must be on the vendor invoice.
- The email accountspayable@omes.ok.gov is the only valid location for invoices (mail is acceptable but less preferred). An invoice is not considered received and valid until the AP team is in possession of it.
- SW1025 invoices must include a timesheet for hours charged on the invoice. A simple one-time repair job does not need to include a timesheet but any sort of long-term hourly labor must include timesheets.
- On timesheets, ensure that you round to two decimals and submit time in 15-minute increments.
- Most invoices will need a time period covered, timeframe of renewal and date of services commencing.

Invoices and payment

Invoicing basics

- A current and correct purchase order number is required on every invoice.
- If the invoice is for a service, it must include the service dates.
- If the invoice is for hourly charges, it must have the number of hours and cost per hour.
- The invoice must match the quote to ensure timely payment.
- Invoice accuracy is important for tracking assets.
- Invoices cannot be issued in advance of a purchase order.

Payment basics

- Pursuant to 74 O.S. §85.44(B), invoices will be paid in arrears after products have been delivered or services provided.
- Payment terms are officially net-45. Interest charged must be according to statute or is rejected as invalid and cannot be paid.

Authority to Operate Orders

What is an AOO?

- An AOO asserts that the supplier's internal security policies meet the minimum standards set by OMES Cyber Command. An AOO is just tied to a security approval, suppliers must still complete an architectural review and go through the normal procurement process.

- In the spirit of efficiency, OMES Cyber Command accepts industry standard assessments and certifications in lieu of Cyber Command's standard assessment since they are substantially similar in structure and content.

- An annual assessment or attestation is required.

- [More information can be found on here](#).

- Questions? Email us at thirdpartysecurity@omes.ok.gov.

Third-party Risk Management

Third-party risk management

OMES has a robust third-party risk management program. The program helps us meet the needs of the state's diverse supply chain and ensures the protection of data and systems by utilizing the following measures:

- Determining cybersecurity requirements for suppliers.
- Communicating cybersecurity requirements.
- Enacting cybersecurity requirements through a formal agreement.
- Verifying cybersecurity requirements are met.
- Governing and manage the above activities.

One of the program's main goals is to vet our primary supplier's security posture as well as their subcontractors and other downstream providers through our assessment process based on the National Institute of Standards and Technology Cybersecurity Framework. If a suppler is accessing, processing, storing or transmitting state data, they must have an Authority to Operate Order (AOO) signed by the state chief information security officer or designee.

Resources

OKLAHOMA
Office of Management
& Enterprise Services

Traffic Light Protocol

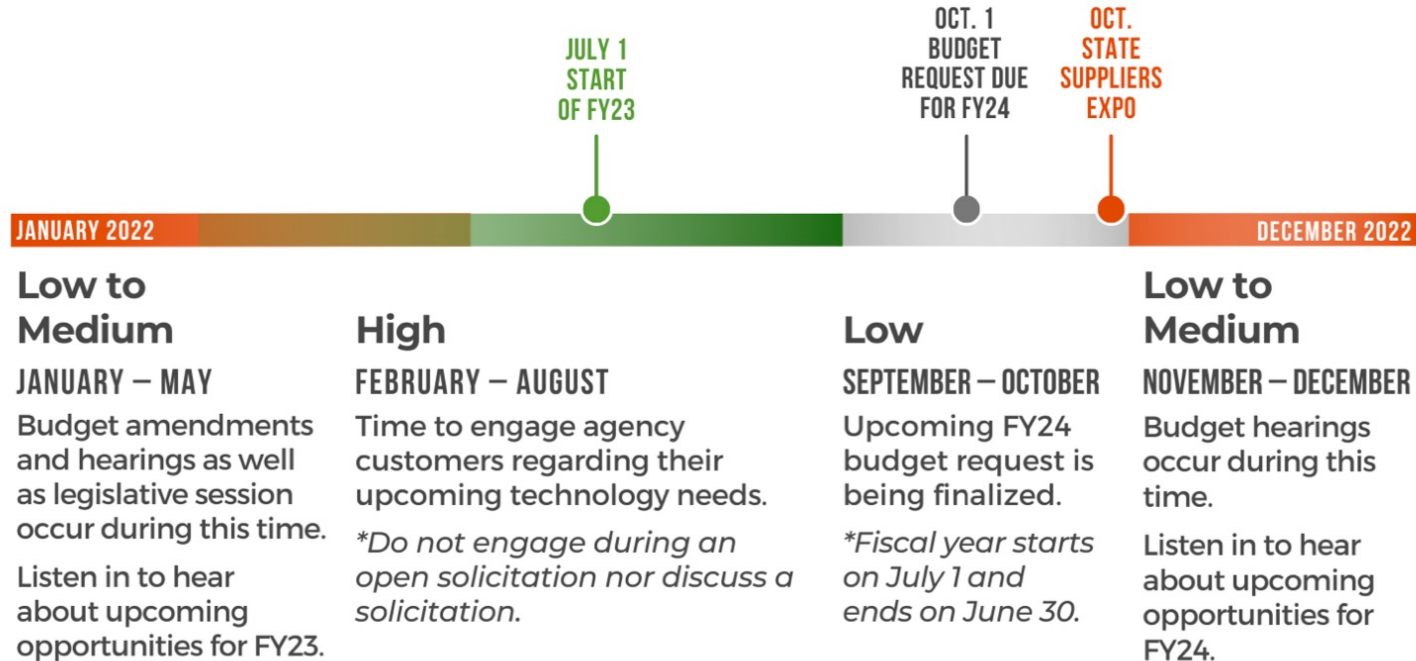| Color	When should it be used?	How may it be shared?
TLP:RED Not for disclosure, restricted to participants only.	Sources may use TLP:RED when information cannot be effectively acted upon by additional parties, and could lead to impacts on a party's privacy, reputation, or operations if misused.	Recipients may not share TLP:RED information with any parties outside of the specific exchange, meeting, or conversation in which it was originally disclosed. In the context of a meeting, for example, TLP:RED information is limited to those present at the meeting. In most circumstances, TLP:RED should be exchanged verbally or in person.
TLP:AMBER Limited disclosure, restricted to participants' organizations.	Sources may use TLP:AMBER when information requires support to be effectively acted upon, yet carries risks to privacy, reputation, or operations if shared outside of the organizations involved.	Recipients may only share TLP:AMBER information with members of their own organization, and with clients or customers who need to know the information to protect themselves or prevent further harm. **Sources are at liberty to specify additional intended limits of the sharing: these must be adhered to.**
TLP:GREEN Limited disclosure, restricted to the community.	Sources may use TLP:GREEN when information is useful for the awareness of all participating organizations as well as with peers within the broader community or sector.	Recipients may share TLP:GREEN information with peers and partner organizations within their sector or community, but not via publicly accessible channels. Information in this category can be circulated widely within a particular community. TLP:GREEN information may not be released outside of the community.
TLP:WHITE Disclosure is not limited.	Sources may use TLP:WHITE when information carries minimal or no foreseeable risk of misuse, in accordance with applicable rules and procedures for public release.	Subject to standard copyright rules, TLP:WHITE information may be distributed without restriction.

Etiquette

- Please call ahead for appointments. Avoid "dropping-in" on any OMES IS contact.

- Make your visits profitable by bringing new ideas, approaches, or products. Avoid social calls.

- Gifts and gratuities are problematic. Do not offer them. Do not give them.

- **When a bid or RFP is active, all communications regarding that solicitation must go through the designated buyer.**

- Always respond to requests for bids, quotes or proposals with your most aggressive offering.

- Please pay special attention to timelines and deadlines. Extensions are rarely given by request and never once the date passes.

When to engage OMES + our customers

WHEN TO ENGAGE

How best to navigate our budget and legislative cycle.

JULY 1
START
OF FY23

OCT. 1
BUDGET
REQUEST DUE
FOR FY24

OCT.
STATE
SUPPLIERS
EXPO

JANUARY 2022 — DECEMBER 2022

Low to Medium
JANUARY — MAY

Budget amendments and hearings as well as legislative session occur during this time.

Listen in to hear about upcoming opportunities for FY23.

High
FEBRUARY — AUGUST

Time to engage agency customers regarding their upcoming technology needs.

Do not engage during an open solicitation nor discuss a solicitation.

Low
SEPTEMBER — OCTOBER

Upcoming FY24 budget request is being finalized.

Fiscal year starts on July 1 and ends on June 30.

Low to Medium
NOVEMBER — DECEMBER

Budget hearings occur during this time.

Listen in to hear about upcoming opportunities for FY24.

Opportunities

Projects,
Stories,
Dashboards.
Oh my!

It has launched.
Visit Oklahoma.gov/projects

EPMO⁺ 2.0

OKLAHOMA
OMES Enterprise Program
Management Office

> **Oklahoma.gov/projects**

OMES IS' Enterprise Program Management Office is constantly curating this site to tell the story of where Oklahoma IT has been and where we are going.

Coming soon: IS radar charts so visit often to learn more about what is on our technology horizon.

Resources

- [Doing Business with Oklahoma](#).

- [OMES Reference Architecture](#).

- [Strategic Alliance Management](#).

- [Third Party Risk Management](#).

- [OMES Accounts Payable](#).

- [Oklahoma.gov/projects](#).

Questions?

sam@omes.ok.gov