



MFMP eQuote Utilization Focus Group

Meeting Information	
Meeting Title:	MFMP eQuote Utilization Focus Group
Occurrence:	April 22, 2014
Time:	9:00 am
Location:	DMS Room 101

Attendees		
#	Entity	Name
1.	AHCA	Lance Dyal
2.	DBPR	Tracy Pyke
3.	DBPR	Gail Jones
4.	DEM	Kara Nevin
5.	DEO	Sonja Strickland
6.	DEO	Kelly Hartsfield
7.	DEP	Valerie Lacy
8.	DEP	Janice Pursley
9.	DEP	Mary Quinsey
10.	DEP	Becky Hale
11.	DHSMV	Alice Riley
12.	DHSMV	Bruce Lynn
13.	DJJ	Michele Lewis
14.	DJJ	Tiffany Rosier
15.	DJJ	Angela Jackson
16.	DMS	Angela Pereira
17.	DOAH	Gregg Pla
18.	DOE	Regina Johnson
19.	DOE	Christina Davis
20.	DOEA	Byron Saper
21.	DOEA	Alice Terry
22.	DOH	Summer Silvestri
23.	DOH	Sonja German
24.	DOH	Tammy Davis
25.	DOH	Bruce Roberts
26.	DOH	Jenny Cooley
27.	DOS	Vonda Murray
28.	DOT	David Callaway
29.	EOG	Cherie Milligan
30.	EOG	Tara Walters
31.	FDLE	Bill Spencer
32.	SSRC	William Zimmerman
33.	MFMP	Kasey Bickley
34.	MFMP	Judson Freeman
35.	MFMP	Melissa Turner
36.	MFMP	TJ Tyler

37	MFMP	Felicia Adams
38	MFMP	Greg Nelson

Topic #	Agenda Topic Description
1.	Objectives
2.	Utilization Timeline
3.	Statistics
4.	Impact of Delay-Purchase-Until
5.	Management Consulting STC
6.	Tip of the Month
7.	Other Topics/Concerns
8.	Future Meetings

Meeting Minutes for Topics	
Topic #	Minutes for Topics
1.	<p>The MFMP team will focus on increasing utilization support and identify areas where agencies could use support in achieving full utilization. This will be done through bi-monthly in-person meetings and bi-monthly conference calls on alternating months.</p> <p>The MFMP team will establish a monthly monitoring and communication process to work with agencies in efforts to close out old eQuotes.</p> <ul style="list-style-type: none"> • A job aid has been developed to close old eQuotes and has been posted on the DMS-MFMP U site. • eQuotes in "Draft" status can be deleted. • eQuotes in "Completed" or "Pending Selection" status will count toward an agency's metric. • Creators of eQuotes that have not been closed after 30 days will receive communication requesting the eQuote be closed. The Purchasing Liaison will be copied. • After 90 days, Purchasing Directors will receive a report of eQuotes that remain "Open." • Issues with closing eQuotes should be brought to the attention of the MFMP Help Desk. <p>A framework document similar to the utilization support initiative will be created for agencies, detailing suggestions for roll-out and recommended best practices.</p> <p>Leveraging MFMP U to provide:</p> <ul style="list-style-type: none"> • Job aids for specific eQuote functions. • A new Sourcing manual covering both quick quote (eQuote) and full project.

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	<ul style="list-style-type: none"> Multiple training channels for agency customers including in-person seminars (provided statewide), in-person workshops, webinars and online training. Multiple training channels for vendor customers, including in-person seminars (provided statewide), webinars and online training.
2.	<p>The utilization support initiative has identified the following milestones for full agency eQuote utilization:</p> <ul style="list-style-type: none"> 1/1/2014 – Begin eQuote Focused Support 7/1/2014 – Achieve 30% Utilization 12/31/2014 – Achieve 50% (Full) Utilization
3.	<p>eQuote Utilization:</p> <ul style="list-style-type: none"> Average agency eQuote Utilization increased from 11.53% in January 2013, to 25.25% in March 2014. As of the March 2014 scorecard, 8 agencies achieved full utilization for metric 5. In 2012, MFMP customers issued a total of 56 eQuotes. In 2013, 1,779 eQuotes were issued (an increase of 3,000%). Through Q3 of 2014, 2,191 eQuotes have been issued. <p>CR 154 (Buyer to Sourcing Integration):</p> <ul style="list-style-type: none"> Buyer to Sourcing Transactions represent 63% of total eQuote events for the month of March 2014. Since release of CR 154 in October of 2013, Buyer to Sourcing Transactions represent 44% of total eQuote events. Workshop trainings are available for those who are still learning about Buyer to Sourcing Transactions. <p>eQuote Training:</p> <ul style="list-style-type: none"> In Q3 of 2014, the MFMP team has trained a total of 233 agency customers in 14 different sessions. A total of 8 statewide training opportunities were offered in the Miami, Ft. Lauderdale, Tampa and Orlando areas. <ul style="list-style-type: none"> The MFMP team appreciates agency help in securing locations to host statewide trainings. eQuote training participation for Q3 is 48% for in-person trainings.
4.	<p>Understanding the impact of DPU orders with MOP B, F or 16:</p> <ul style="list-style-type: none"> Agencies have received utilization credit for the current year for completion of eQuote events with a DPU of July 1st or later (provided the eQuote event is in "Pending Selection" or "Completed" status). Purchase orders with a DPU of July 1st or later will be excluded from the eQuote utilization metric for next fiscal year. Utilization metrics will reset at the beginning of the next fiscal year.
5.	<p>STC 973-000-14-01 has been executed for the contract term 01/15/2014 through</p>

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	<p>01/14/2017.</p> <p>This contract provides a great opportunity for eQuote Utilization using MOP “B.”</p> <p>There are two parts of the contract:</p> <ul style="list-style-type: none"> • Actuarial / Auditing Services – 7 identified vendors • Management Consulting – 11 identified vendors <p>Customers must issue Requests for Quote (RFQs) to all awarded contractors for each section, regardless of the purchasing threshold in which the procurement falls.</p> <p>When drafting an RFQ, the customer should include, at a minimum:</p> <ul style="list-style-type: none"> • Statement of Purpose / Need • Scope of Work • Project Tasks and Deliverables • Project Timeline • List of Contractor Responsibilities • Qualifications / Certifications of the Consultant(s) • Method of Compensation • Financial Consequences for Non-Performance • Special Terms and Conditions
6.	<p>The MFMP team requests that agency customers check the unit of measure tied to each Line Item before publishing.</p> <p>Using a unit of measure such as “each,” with a corresponding quantity greater than 1, can be misleading, especially if the Project Owner has requested vendors to provide a “single lump sum price.”</p> <p>To ensure accurate vendor responses, use a unit of measure and quantity that agrees with the good or service you are procuring. The Sourcing application will provide a grand total for each Line Item based on the quantity specified by the Project Owner and the dollar amount provided by the Vendor.</p> <p>There are opportunities to provide additional points of clarification to convey what is trying to be procured for any Purchase Order.</p> <p>eQuotes can be done on Blanket Purchase Orders, but they are not good candidates for Buyer to Sourcing integration.</p>
7.	<p>eQuotes can be marked as “Completed,” even if it has been awarded outside of Sourcing.</p> <p>A system enhancement that resulted from the last eQuote Focus Group was to add a</p>

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	<p>solicitation contact into the Vendor Information Portal (VIP). This will be implemented on April 29th and will allow vendors to designate email address to receive notifications from VBS and Sourcing.</p> <p>eQuotes that have gone into the “Archived” status are being investigated as a potential SIR.</p> <p>The MFMP team has had two calls from vendors who had issues accessing Sourcing because Internet Explorer 10 was being used. The MFMP team recommends the compatability mode be used to access the application if this occurs.</p> <p>The MFMP team encourages agencies to continue promoting training for vendors. Sample communication is available for use to drive vendors to trainings.</p> <p>The MFMP team has prioritized a change request to add a vendor’s location (County) into Sourcing.</p>
8.	<p>Focus Group meetings will be conducted both in-person and via conference call, alternating each month.</p> <ul style="list-style-type: none"> • Next month’s meeting will be held on May 15th, from 10:30 – 11:30 am via conference call. Call-in information will be distributed soon. • Conference call meetings will function as “Office Hours” and agencies can call in with questions or concerns they may have, as needed. • We will meet again, in person, on June 5th in Room 101 at the Department of Management Services.

Action Items					
#	Action Item Description	Assigned To	Status	Due Date	Comments
1.	Create promotional materials for agencies to send to vendors	MFMP			