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From: cmsusers-bounces@mailman.state.co.us on behalf of Contract Management System User Mailing List [cmsusers@mailman.state.co.us]
Sent: Friday, July 08, 2011 3:29 PM
To: cmsusers@mailman.state.co.us
Subject: [CMSusers] CMS Updates and Pending Changes - July 8 2011
Attachments: SB228_Agency_HigherEd_Contacts_07 7 2011.pdf; ATT1036109.txt

Happy Friday!

This message will inform you of changes to a few contract types and fields and provide additional guidance related to interim ratings as related to Task Orders.

Some minor changes you will encounter when creating contract records in CMS

In addition to the changes related to the certification fields (detailed in my June 30th message), here are a few others to be aware of:

1. Vendor Agreement → This contract type is selected for under \$5000 which makes it discretionary and a Sole Source would not apply.

a. Given this, 4 fields related to SS can and will be removed from this contract type. These include:

If this is a Sole Source, was a “Sole Source Justification and Certification” form completed, and placed in contract file, that includes the mandatory determination steps? (‡ §)

Sole Source Justification.

If selected OTHER, enter the justification for the Source.

Select ALL steps taken in making the Sole Source determination.

b. According to DHR’s Technical Guidance, Personal Services review does not generally apply to purchases <\$5000. As such, 8 fields related to personal services, can and will be removed from this contract type. These include:

Is the Contractor/Vendor performing work previously performed by State Employee(s)?

How many positions (FTE) is the Contractor/Vendor filling that were previously performed by State Employees?

For work previously performed by State Employees, how long did the Contractor perform the work? (# of months)

How many positions were ELIMINATED by the Contractor/Vendor performing this Work?

Number of State Jobs Created (‡ §)

Duration of State Jobs Created (‡ §)

What Quality Improvements did the State gain by having Contractor/Vendor do the Work previously performed by State Employees?

What Dollar (\$) Savings did the State gain by having Contractor/Vendor do the Work previously performed by State Employees?

2. Price Agreements → Questions have come up concerning the fact that not all Price Agreements are primarily services in nature. In other words, there will be (and are) situations in which the services are incidental to (simply accompany) the goods. This

means, that the umbrella contract type is not really Personal Services, but rather Commodities/Goods.

a. When originally set up, the current umbrella contract types and subtypes made sense. Since then, some things have changed and in order to best describe the contract the CMS record represents, a change is needed. The change will be:

➤ Addition of Price Agreement as a subtype under Commodities/Goods (this would result in Price Agreement now being a subtype under Commodities/Goods *and* Personal Services).

b. If you have a mixed procurement, you will need to decide whether to pick Personal Services or Commodities/Goods as the umbrella contract type. Ask yourself what is the primary purchase. For example, if you are purchasing printers and the contract includes maintenance, then the contract is for Goods with the services accompanying that purchase. If on the other hand, you have an IT contract to buy software and the vendor will be installing and configuring, this is a Services contract with accompanying goods. Look at what comes with what. What is leading the purchase.

c. Steps to create future Price Agreement contract records . . .

i. Determine if it is primarily Goods or Services.

ii. If primarily Services, select Personal Services as the contract type then select Price Agreement as the subtype.

iii. If primarily Goods, select Commodities/Goods as the contract type then select Price Agreement as the subtype.

iv. Enter a descriptive title (this holds true for all records).

CMS continues to be an evolving creature. One you could describe as a “Live Implementation.” We are all still learning what the system itself is capable of, and the “correct” way of entering records. I thank you all for your continued patience, hard work, and excellent suggestions/comments. Without feedback from all the worker bees, I would have no way to know all the ins and outs and needs in order to make the system work better for most users.

All the changes to CMS will be made either the 12th or 13th of July.

Additional guidance related to interim ratings as related to Task Orders

Many contracts have reached their end, and final ratings have been assigned. Still others are being evaluated each year and an interim rating assigned to assist in generating a final rating sometime in the future. Then there’s the Task Order contract – the contractual agreement consisting of a Master document with mini-contracts for work issued over time per the general SOW detailed in the Master. As with most processes, changes happen and better methods are developed. The following is intended to assist those who are issuing task orders and are at a point of conducting an interim evaluation; and also to prepare everyone in case they ever need to utilize this process.

That said:

- Each Task Order (TO) is a mini subcontract under the Master Agreement. Thought of in this manner, once the work under the TO is complete, then the evaluation and rating is final for that mini subcontract and interim for the work provided to date under the Master.
- At the end of each year, the final ratings given to each TO are reviewed as part of an interim evaluation/rating of the Master Agreement. This will support the decision made as to whether to certify the vendors work thus far and continue for another term.
- Once the Master Agreement has reached its term limit (5-years most often), then all of the interim evaluation/ratings of the Master Agreement are reviewed and a FINAL rating is given to the vendor. This is the final, final rating that is entered into the CMS field and (depending on the dollar amount) posted on the public website.

What you have building throughout the Master Agreement term is:

1. A series of TO-final ratings.
2. A series of Master-interim ratings. à TO.1-final + TO.2-final + TO.3-final etc . . = Master Interim 1
3. A final Master rating. à Master Interim 1 + Master Interim 2 + Master Interim 3 etc. . = FINAL rating

The individual responsible for evaluation and ratings varies by agency and project. Project and contract staff should continue to work together to determine the best means of approaching evaluations. Don't forget to use the forms provided on the OSC webpage to assist in evaluations.

Attached is the current Single Point of Contact list (also available on OSC website).

<<SB228_Agency_HigherEd_Contacts_07 7 2011.pdf>>

Thank you for your attention, patience and continued good work.

Brenda

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[Click here to check for any CMS and OSC updates](#)