



Print Management Strategies Team

Opportunities for Collaboration

January 31st, 2017 – First Quarterly Meeting

1500 Jefferson Street, Olympia – Presentation Room 1st Floor – Enterprise Services

Judy Lorenzo, Business Resources Division

David Baker, Business Resources Division

Josh Klika, Contracts, Procurement, and Risk Management Division

Jeff Kessler, Real Estate Services Division, Internal Facilities

Today's Topics

- Welcome and Introductions
- Print Management Strategies Team
- DES Role: Facilitate Statewide Print Management Implementation
- Refresher on Terms
- 2016 Print Management Survey
- Best Practices and Resources
- April Agenda Topics
- Meeting Re-Cap



Print Management Strategies Team

– Purpose of Team

- Serves as an ad-hoc forum for collaborating on print management best practices to develop a community of practice.
- Develops guidance and shares resources to help agencies implement.
- Provides clarification of the rule, reporting requirements, and updating policy, and implementing best practices.

– 2017 Meeting Schedule

- Four Quarterly Meetings
 - January 31
 - April 25
 - July 26
 - October 24

– Membership

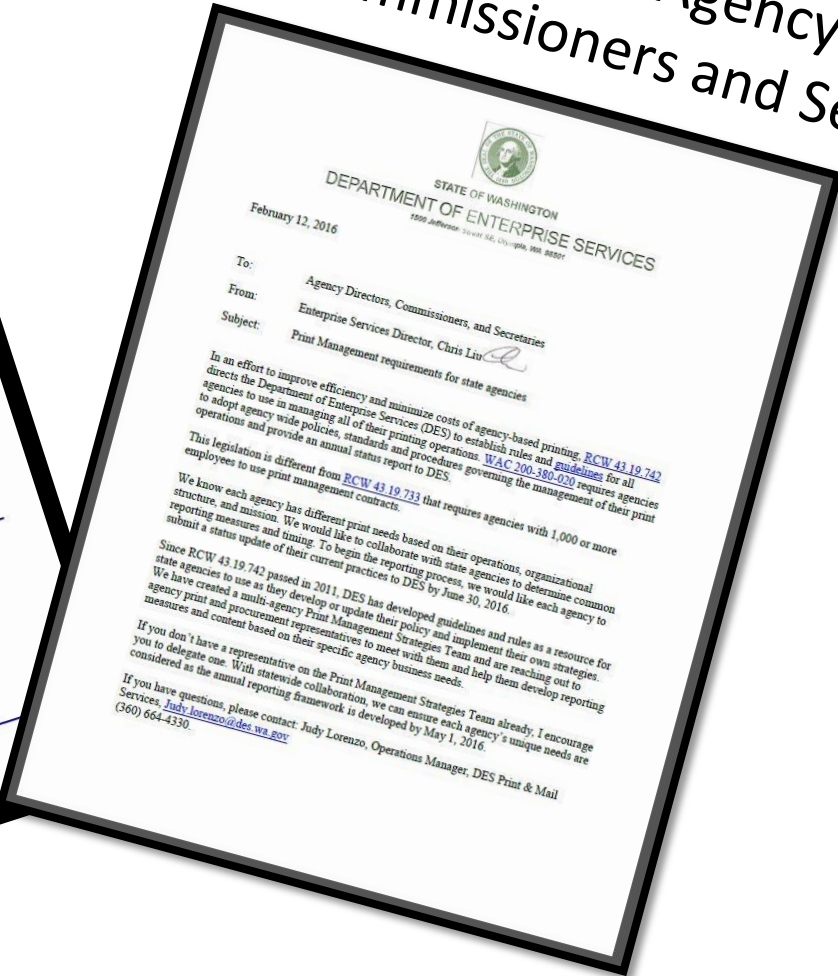
- Representatives from state agencies focused on implementing print management requirements within their respective agencies.



2010 to 2016 Brief History

- Guidelines for Managing Print Operations

- DES Message to Agency Directors, Commissioners and Secretaries



DES Role: Print Management

– Facilitate Statewide Print Management Implementation

- Guide state agencies, boards, commissions, and institutions of higher educations in complying with the new requirements.
- Encourage Economical and Efficient Printing.
- Leverage the purchasing power of the state.
- Serve as *Repository* and *Publisher* for Annual Reports.
- Solicit input from agencies, boards, commissions, and institutions of higher education on resources to assist their efforts.

– Existing RCWs & WAC

– Performance Audit Direction

- Ensuring Economical and Efficient Printing for Washington



Print Management Policy

WACs & RCWs	DES	State Agencies, Boards, Commissions	Higher Education	1,000 + FTEs
RCW 43.19.742 Directs DES to create a print management rule	✓			
RCW 43.19.733 Managed print required for agencies with 1,000+ employees	✓	✓	✓	★
WAC 200-380 <ul style="list-style-type: none"> Agencies must adopt a print policy, Determine baseline costs and Report to DES annually 	✓	✓	✓	✓
RCW 43.19.739 Agencies must consult with DES for printing and binding	✓	✓	✓	✓
RCW 43.19.745 Agency Use of envelopes-Standardization	✓	✓	✓	✓
RCW 28.10B.029 Grants colleges independent authority to purchase materials, supplies, and equipment.			✓	

DES Role: Print Management

– Implement Performance Audit Directions

- **Publish** each agency's **progress** at implementing the state's print management requirements so the Governor, Legislature and public can monitor their progress.
- Continue outreach to agencies to **ensure awareness** of the state's print management requirements and guidelines.
- **Request** that agencies report their baseline **printing costs** and how those costs have changed over time as a result of print management efforts.
- Continue to **offer training** and assistance to agency personnel on print management.
- **Report progress** to *Results Washington*.



Next Steps: 2016 Performance Audit Recommendations

Ensuring Economical and Efficient Printing for Washington

https://www.sao.wa.gov/state/Documents/PA_Efficient_Print_Services_ar1017881.pdf



Refresher on Terms

Q: What is Print Management?

A: The overarching general term that applies to the management of all agency printing operations, including agency self-service and supplier generated printed material, services, and/or equipment.



At DES we call this the *Toolbox of Strategies*.

Q: What is Managed Print?

A: Refers to the in-house printing operations and related contracts for printing devices at an agency.

At DES we call this *Internal Use Print*.



2016 Print Management Survey

– Results

- Very preliminary
- Fewer than 50 agencies, boards, commissions and institutions of higher education completed the survey.
- For agencies that have 1,000 or more FTEs, 12 have implemented managed print practices.
- Most agencies do not have an existing print management policy.

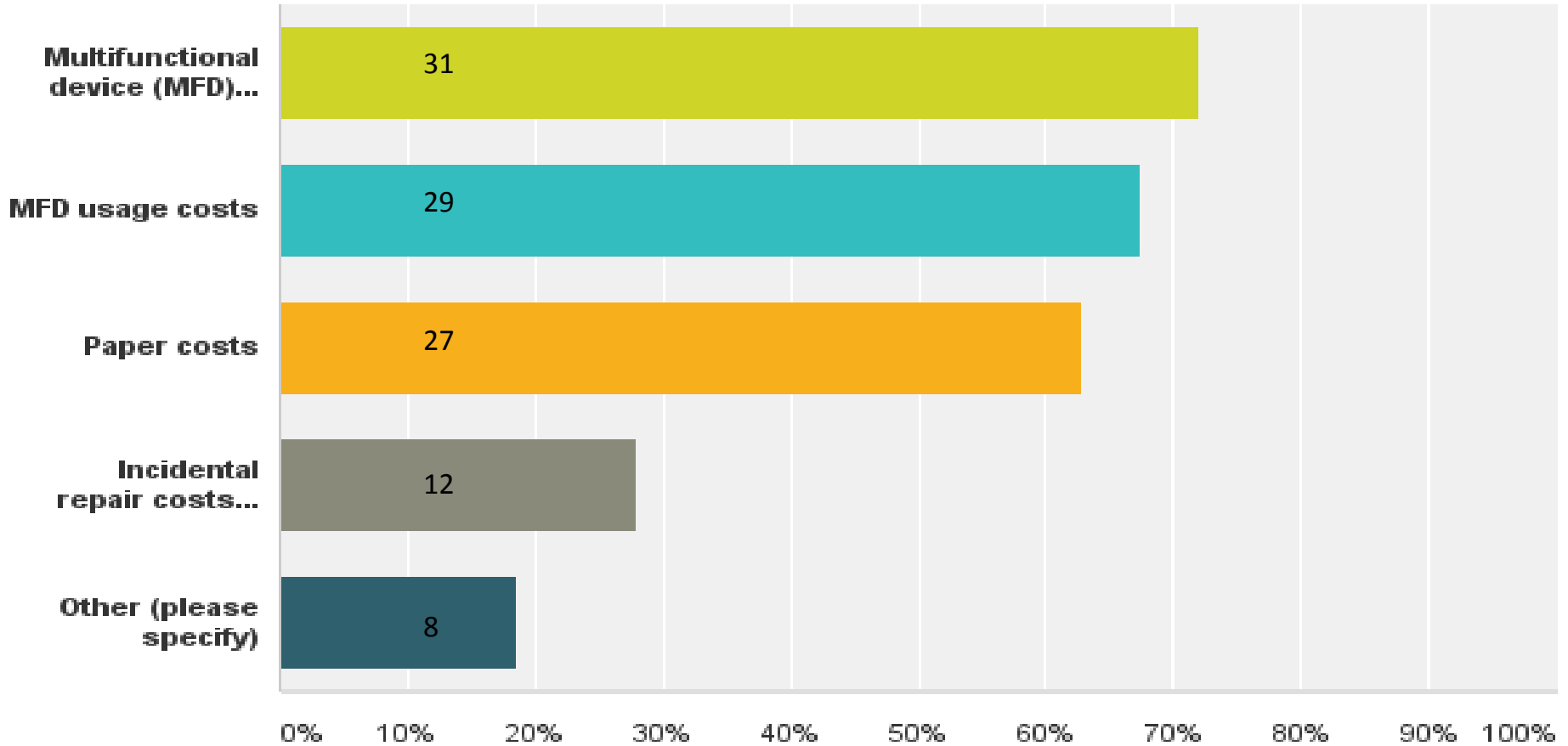


Preliminary 2016 Survey Highlights

- More than 30 entities are in the process of developing a print management policy.
- More than two dozen entities responded they:
 - Are subject to specific federal and state laws, rules and regulations that require them to print and mail correspondence to their customers.
 - Have policies, executive orders or procedures that require printed information for distribution to customers to fulfill their agency's mission.



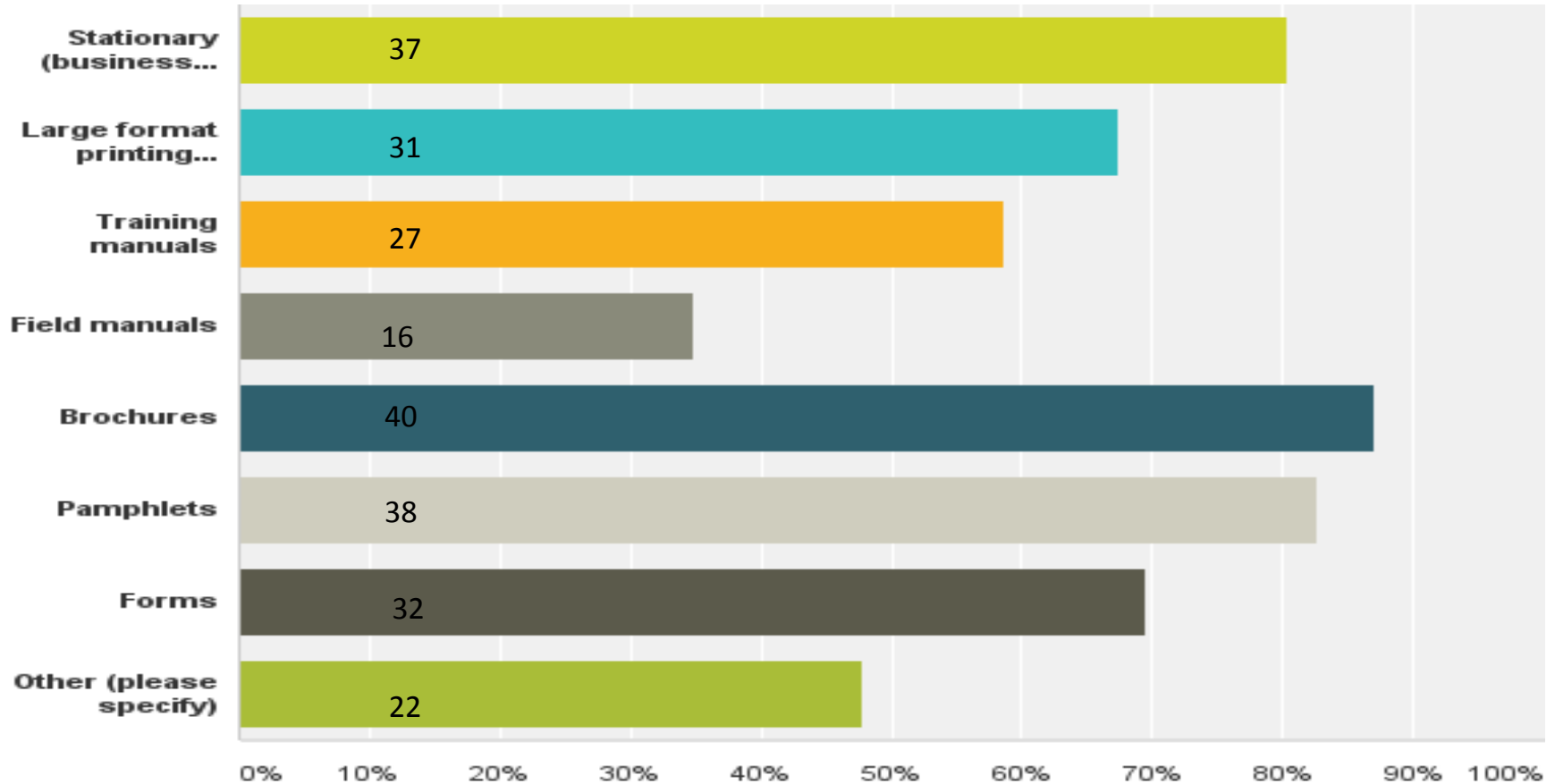
Which of the following additional expenditures/metrics do you incur and report on internally? (Check all that apply)



Preliminary results



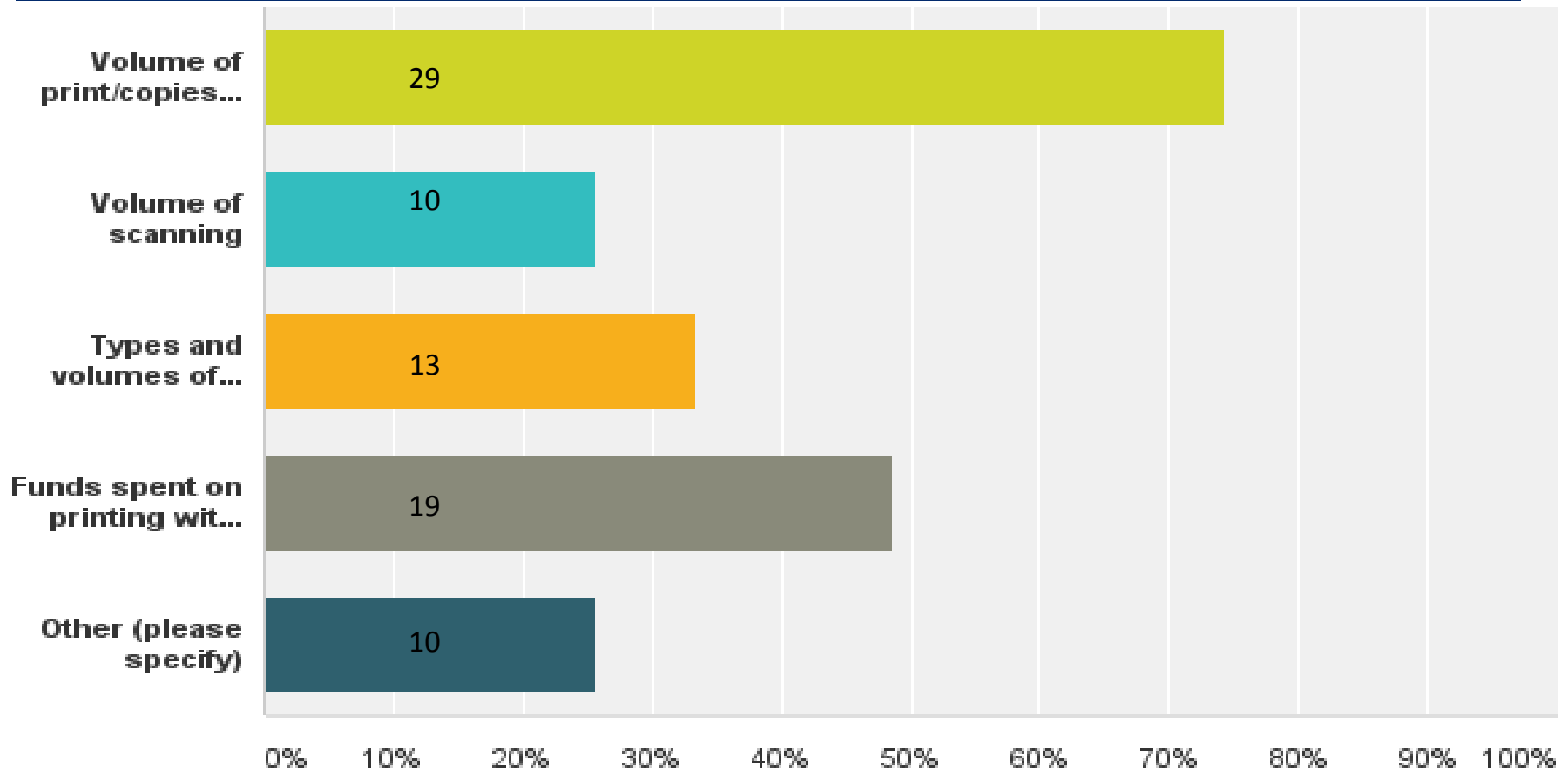
What are the types of printing your agency generally does as a normal course of business? (Check all that apply)



Preliminary results



Please check every metric your agency reports internally



Preliminary results



Second Wave 2016 Survey

February 3, 2017

- Survey link will be sent to dozens with 10 or more FTEs.
- Those with 9 or fewer FTEs will get a different communication in February.
- For those that have 1,000 or more FTEs, DES is doing targeted outreach to discuss managed print requirements.

February 23 – Second Wave Due Date

– Don't Miss Out



2016 Print Management Survey

– Publishing Deadline is March 31, 2016

- Each entity will have the opportunity to review their summary to confirm content used.
- The primary goals for the 2016 are to provide:
 - A statewide overview
 - Individual agency summaries of the status of print management practices in Washington state.
 - Include as many entities as possible to share success stories
- DES will be compiling the first batch of results in February.
- It is expected that Second Wave could be close to 100 responses! That would be awesome!



Short Break



Best Practices and Resources

- DES Print Management web site is your primary source for information.
- Print Management Strategies Team members will receive GovDelivery notices when new resources are added.
- It will also include links to resources and examples from DES, other agencies, and institutions in Washington and in other states.

<http://des.wa.gov/services/printing-mail/printing-services/print-management>



Print Management Web Resources

Print Management

The Washington State Legislature changed print management requirements in 2011. These policy changes included directing the Department of Enterprise Services to develop rules to guide implementation.

DES developed guidelines as a resource for state agencies to use in order to identify and implement print management strategies. Print is produced by a wide variety of methods. Some examples include:

- Copiers
- Multifunctional devices
- Offset print
- Desktop printers

Print management resources

- [Print management requirements in Washington state](#)
 - [RCW 43.19.742](#) – Policy direction
 - [WAC 200-380](#) – Rule
 - [RCW 43.19.733](#) – Managed print
 - [RCW 43.19.739](#) – Consultation
- [Guidelines for managing print operations](#)
- [Message to agency directors, commissioners and secretaries](#)

Print Management Strategies Team

- [Jan. 31, 2017 meeting resources](#)
 - [Agenda](#)
 - [PowerPoint presentation \(Coming soon\)](#)
 - [DES Draft Managed Print Policy - Internal Use Print Policy](#)

Contacts

- [Judy Lorenzo](#), DES Business Innovations and Initiatives Manager, (360) 664-4330
- [David Baker](#), DES Business Initiatives Specialist, (360) 664-4380

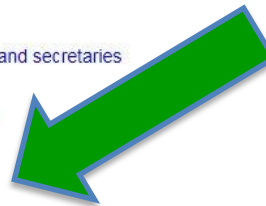
Mail Services

Printing Services

- [Customer Support](#)
- [Forms and Templates](#)
- [Menu of Printing & Imaging Services](#)
- [Online Ordering](#)
- [Print Management](#)
- [Printing and Imaging Program Updates](#)
- [Production Services](#)
- [Resource Center](#)

Annual Surveys will be published to this website.

Quick Access to Quarterly Meeting Information and Examples of Policies



Keeping it Simple



Print Management Policy Development Ideas

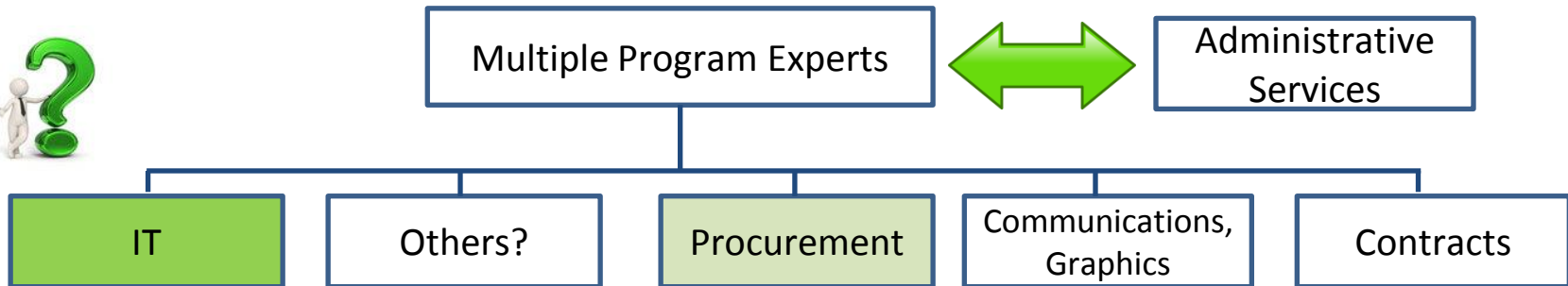


Print Management Policy

Policy Direction: WAC & RCW

Agency Leadership – Executive Orders – Directives - Procedures

Print Management Policy Development Process



Agency Workforce

Policy Implementation – Training – Annual Reporting



Print Management Policy



Print Management Policy Development Process

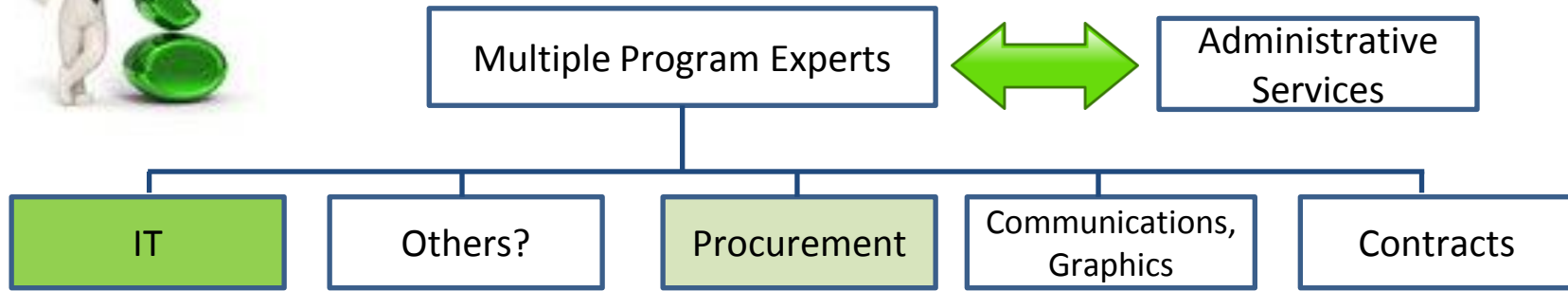


IDEAS:

1. In the context of your agency mission get the right people together
2. Become familiar with the print management requirements
3. Map the current state of your print procurement practices this includes documenting your efforts to increase efficiency
4. Determine your Base Printing Costs and inventory your printer fleet
5. Define a Plan for Achieving Increased Progress in the Context of Your Agency Mission



1. get the right people together



Print Management Policy Implementation



Agency Workforce

Policy Implementation – Training – Annual Reporting

- A. What changes have you already implemented without a “policy”?
- B. What tools do you currently use?
- C. If the “policy” defines changes to existing decision making protocols, how will your agency deploy and engage the workforce?
- D. What training will be needed?
- E. How will you define progress?
- F. How will you measure success?



DES Contracting

HOME
welcome

SERVICES
what we do and provide

ABOUT
who we are

CONTACT
get in touch with us



[home](#) > [services](#) > [contracting & purchasing](#) > [it contracts & purchasing](#) > [technology master contracts & enterprise agreements](#)

[Sign up for email/text updates](#)

Technology Master
Contracts & Enterprise
Agreements

- Agile
- Cabling
- Cell Phones and Service Plans
- Cloud Services
- Computer Equipment
- Data Communication
- Enterprise Content Management
- Information Technology Professional Services
- Information Technology Services Management (ITSM) Software as a Service (SaaS)
- Master Contract FAQs
- Media Storage (off site)

Technology Master Contracts & Enterprise Agreements

- Are mandatory-use contracts.
- Are administered by Enterprise Services.
- Are used by governmental entities to purchase products and services directly from the contractors.
- Purchasers must have completed a [Master Contracts Usage Agreement \(MCUA\)](#).
- Contact DES [Contracts, Procurement and Risk Management](#) with questions.

Contract List:

- [Agile](#)
- [Cabling](#)
- [Cell phones and service plans](#)
- [Cloud Services](#)
- [Computer equipment](#)
- [Data communication](#)
- [Digital Communication Services](#)
- [Enterprise Content Management](#)

<http://www.des.wa.gov/services/contracting-purchasing/it-contracts-purchasing/technology-master-contracts-enterprise-agreements>



IT Contracts



DES Master Contracts

[http://www.des.wa.gov/services/
contracting-purchasing](http://www.des.wa.gov/services/contracting-purchasing)



Best Practices and Resources

April Agenda Topics

1. 2016 Published Survey Results Summary
2. 2017 Survey
 - a. Review schedule
 - b. Publishing ideas
 - c. Finalize content for fiscal items

What additional April agenda topics would you like to include?



April Agenda Topics – Finalize 2017 Survey Content for Fiscal Items

Policy Implementation – Training – **Annual Reporting**

How Would Your Agency –College – Commission -
Board Like to Collaborate with DES on Refining
the Annual Reporting Specifics?



Thank-you!



Washington State Department of
Enterprise Services

What you need
How you need it
When you need it

Extra Print Management Slides



Collaborations and Technical Assistance

- Consultation is an Opportunity
- Our Knowledgeable Staff and Wide Range of Services Can Save You Time and Money
- That's Why We're Here!
- DES Desires to be Responsive to Customer Needs
- We are Learning from Each Other Through the Print Management Strategies Team



Your Questions

RCW 43.19.739 Reducing Costs-Agencies to consult with department

QUESTION: What does RCW 43.19.739 imply?

Do we need to contact DES every time we purchase a printing or binding job? I believe we need some guidelines from DES regarding the above statement unless we must contact DES prior to every single printing or binding job. Currently, our college credit card users are allowed to purchase printing and binding jobs via credit card.

ANSWER:

YES, according to the institution's print management policy. DES believes that how this consultation works should be customized to "fit" the agency or institution. The core mission of the agency and the resources within the agency should guide how this works. One size does not fit at entities.

DES is ready to consult on a more global scale with agencies and provide options, direction, and guidance, opportunities, and services available in-plant and through the DES Farmout vendors. Agencies still have direct buy authority to make the decision on who to choose.

RCW 43.19.739 *For every printing job and binding job ordered by a state agency, the agency shall consult with the department on how to choose more economic and efficient options to reduce costs.*



Your Questions

RCW 43.19.748 Public printing for state agencies and municipal corporations- Exceptions to in-state requirements.

QUESTION: Does this RCW imply that prior to any purchasing printing, binding, or stationery work outside of state we must justify why the work could not be completed within Washington or is not cost effective etc.? Currently, our college credit card users are allowed to purchase printing, binding, and/or stationery work in-state or out-of-state.

ANSWER: YES, according to your institution's print management policy. DES can assist with this. DES evaluates this during the competitive bid process by penalizing the out of state vendors 10% of their bid not to exceed \$5K. So for example a \$1K job would actually become a \$1,100.00 job.

RCW 43.19.748

All printing, binding, and stationery work done for any state agency, county, city, town, port district, or school district in this state shall be done within the state, and all proposals, requests, or invitations to submit bids, prices, or contracts thereon, and all contracts for such work, shall so stipulate: PROVIDED, That whenever it is established that any such work cannot be executed within the state, or that the lowest charge for which it can be procured within the state, exceeds the charge usually and customarily made to private individuals and corporations for work of similar character and quality, or that all bids for the work or any part thereof are excessive and not reasonably competitive, the officers of any such public corporation may have the work done outside the state.



Your Questions

RCW 43.19.751 Public printing for state agencies and municipal corporations-Allowance of claims

QUESTION:

Does this RCW suggest if we purchase printing outside of Washington and the purchase can't be justified, a fund source other than state funds must pay for the service?

ANSWER:

This is a question that needs further discussion. One interpretation of the RCW could be that "its funds" is not limited to state funds. In many cases federal funds are matched with state funds for grants. Each type of funding brings with it its own set of purchasing and use requirements. The hope here is that the agency or institution's print management policy would address this topic with the highest level of due diligence.

RCW 43.19.751 *No bill or claim for any such work shall be allowed by any officer of a state agency or public corporation or be paid out of its funds, unless it appears that the work was executed within the state or that the execution thereof within the state could not have been procured, or procured at reasonable and competitive rates, and no action shall be maintained against such corporation or its officers upon any contract for such work unless it is alleged and proved that the work was done within the state or that the bids received therefor were unreasonable or not truly competitive.*



Your Questions

RCW 43.19.754

Public printing for state agencies and municipal corporations-Contracts for out-of-state work

QUESTION:

How do we ensure out-of-state printing vendors are in compliance with Washington labor and employment laws?

ANSWER:

You can rely upon DES to help. When you consult with DES you have access to nearly 400 prequalified vendors. We require each out of state vendor sign a certificate of assurance. You can model your procurement process after the DES approach.

RCW 43.19.754

Pursuant to Chapter 365, 1999 Laws of Washington and RCW 43.19.754, printing, binding and stationary work performed for any Washington state agency, county, city, town, port district or school district done outside of the State of Washington must 1) be executed under conditions of employment which substantially conform to Washington State laws, and Washington State Department of Labor and Industries rules, regarding hours of labor, the minimum wage scale, and conditions of employment; and 2) favorably compare to the labor standards and practices of the lowest competent bidder within Washington State.



How Printing Policy Applies to Institutions of Higher Education



Bob Ferguson
ATTORNEY GENERAL OF WASHINGTON

Education Division
800 Fifth Avenue • Suite 2000 • MS TB-14 • Seattle WA 98104-3188 • (206) 389-2059

MEMORANDUM

DATE: July 22, 2016
TO: John Ginther, Director of Accounting and Business Services
State Board for Community and Technical Colleges
FROM: Derek Edwards, Senior Counsel
Education Division
SUBJECT: **Print Management Services**

You asked whether the community and technical colleges have authority independent from the Department of Enterprise Services (DES) to perform print management services. RCW 28B.10.029(1) does provide the colleges with authority independent of DES in connection with the purchase of material, supplies, services, and equipment. This authority appears broad enough to cover outsourcing printing services to private vendors, purchasing printing equipment, and purchasing supplies with some DES oversight.

Prior to 2011, former RCW 28B.10.029(5) specifically authorized the colleges to independently exercise those powers otherwise granted to the public printer under former RCW 43.78, *repealed by* Laws of 2011, 1st spec. ch. 43 § 306. In 2011, DES assumed the public printer's role in providing print management services to state agencies and institutions. RCW 43.19.733 through .745.

RCW 43.19.733 pertains to state agencies "that are required to use print management services," but the statute then goes on to say that "all state agencies" with more than 1,000 FTEs shall use print management services brokered by DES. RCW 43.19.733(3)(emphasis supplied). RCW 43.19.739 requires state agencies to reduce costs by consulting with DES when they order print jobs and binding. RCW 43.19.745 requires all state agencies to cooperate with DES to standardize envelopes. RCW 43.19.742 provides that DES must adopt rules and guidelines for "all agencies to use in managing their printing operations, including both agency-based printing and those jobs that require the services of a print shop. . . ." Those rules can be found in WAC 200-380. WAC 200-380-030 requires agencies to adopt policies, standards, and procedures governing management of their print operations. The agencies must submit annual "print management strategy reports" to DES.

CONFIDENTIAL ATTORNEY/CLIENT PRIVILEGED COMMUNICATION
DO NOT DISCLOSE

ATTORNEY GENERAL OF WASHINGTON

John Ginther
July 22, 2016
Page 2

These laws should be read as complementary to each other. RCW 28B.10.029 provides a number of exceptions to the general rule that colleges have independent authority to purchase materials, supplies, services, and equipment. See RCW 28B.10.029(1)(c) (motor vehicles), (1)(e) (engineering and architectural services), and (1)(g) (risk management insurance). Notably, none of the exceptions in RCW 28B.10.029 references RCW 43.19.733 through .757 (print management services).

Although there is some ambiguity, the best way to harmonize these authorities, is to conclude that colleges retain the independent authority to purchase print management equipment, supplies, and services. But colleges must comply with RCW 43.19.739 -and .745(consultation with DES) and RCW 43.19.742 and WAC 200-380-030 (adoption of college-wide policies and annual reports to DES). These laws apply to all state agencies regardless of whether the agency has independent authority to purchase print management services and equipment.

I trust that this memorandum fully answers your question about the colleges' authority to engage in print management services.

DE:aa

..., the best way to harmonize these authorities, is to conclude ...

- AG Communication on Print Management Services

