# Washington State Department of Enterprise Services

## Meeting agenda

**Date:** January 23, 2018
**Time:** 9:00 - 10:30 a.m.
**Location:** 1st Floor Presentation Room, 1500 Jefferson Street, Olympia
**Attendees:** Statewide Print Management Strategies Team

| Time | Topic | |
|---|---|---|
| 9:00-9:05 | Welcome –Housekeeping for WebEx | Information |
| 9:05-9:15 | What's new? Key Definitions | Information and Discussion |
| 9:15-9:25 | Searching for Best Practices | Discussion |
| 9:25-9:45 | Best Practices for Managed Print | Information and Discussion |
| 9:45-10:00 | Guest Presenter Pamela Hawkins-Hull from the Employment Security Department | Information and Discussion |
| 10:00-10:25 | Gearing Up for the 2018 Survey: Preparation to Track Baseline Costs | Discussion and Action Item |
| 10:25-10:30 | Wrap Up and Next Steps | Action Item |

Washington State Department of
# Enterprise Services

# Statewide Print Management Strategies Team

## *Opportunities for Collaboration – Q1*

### January 23, 2018 – Quarterly Meeting
**1500 Jefferson Street, Olympia – Presentation Room 1st Floor – Enterprise Services**

**Print Management Strategies Team Resources:**

**Judy Lorenzo, Business Resources Division**
**David Baker, Business Resources Division**
**Josh Klika, Contracts & Procurement**
**Jeff Kesseler, Managed Print & Internal Use**

**Guest Presenter: Pamela Hawkins-Hull, Employment Security Department**

# *Today's Agenda*

| Time | Topic | | Who |
|------|-------|---|-----|
| 9:00 | Welcome – Housekeeping for WebEx | Information | Judy |
| 9:05 | What's New?  Key Definitions | Information | David |
| 9:15 | Searching for Best Practices | Discussion | David |
| 9:25 | Best Practices for Managed Print | Information and Discussion | Josh Jeff |
| 9:45 | Best Practices – Pamela Hawkins-Hull, Employment Security Department | Information and Discussion | Pamela |
| 10:00 | Gearing Up for the 2018 Survey: Preparation to Track Baseline Print Costs | Discussion and ACTION ITEM | Judy |
| 10:25 | Wrap Up and Next Steps | ACTION ITEM | Josh |

# *What's New?*

- Report
- Website
- Outreach and Collaboration Efforts

# *2017 Consolidated Print Management Status Report*

**2017
Consolidated Print Management
Strategy Status Report**

July 1, 2016 - June 30, 2017

Washington State Department of
**Enterprise Services**

- Approved by OFM
- Transmitted to legislative leadership
- Published on the print management [webpage](webpage)
- Includes all 105 agency reports (survey responses)

# *Print Management Web Has a New Look*



Find current Master Contracts

**HOME**
welcome

**SERVICES**
what we do and provide

**ABOUT**
who we are

**CONTACT**
contact

Washington State Department of
**Enterprise Services**

Home » Services » Printing & Mail » Printing Services » Print Management

Sign up for email/text updates

## Print Management

Mail Services

**Printing Services**

Customer Support
Forms and Templates
Menu of Printing & Imaging Services
Online Ordering
Print Management
Production Services
Resource Center

Print management is 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.

### Statewide Print Management Strategies Team
Enterprise Services convenes a Statewide Print Management Strategies Team on a quarterly basis to further statewide collaboration. This ad-hoc team includes representatives from a variety of state agencies, boards, commissions, and institutions of higher education.

Quarterly meetings occur from 9 -10:30 AM at 1500 Jefferson in Olympia and via webinar for accessibility statewide.

#### Meeting schedules & presentations

| 2018 | 2017 |
|------|------|
| January 23 | January 31 |
| April 17 | April 25 |
| July 17 | July 26 |
| October 23 | October 24 |

### Consolidated Annual Print Management Status Reports
All state agencies, boards, commissions, and institutions of higher education are required by WAC 200-380 to report their print management implementation status annually. This information guides outreach efforts and helps agencies learn from each other to develop more efficient printing practices.

- 2017 Report Transmittal Letter from Chris Liu
- 2017
- 2016

### Policies, Standards, and Procedures
View samples of policies, standards and procedures. This list will be updated periodically.

**Policy, direction and guidance**

- RCW 43.19.742 – Policy direction
- WAC 200-380 – Rule
- RCW 43.19.733 – Managed print
- RCW 43.19.739 – Consultation

**Additional resources**

- Print management requirements fact sheet
- Managed Print Services - How to Get Started Nov. 20, 2017
- Guidelines for managing print operations
- Message to agency directors, commissioners and secretaries

**Contact information**

- Judy Lorenzo, DES Business Innovations and Initiatives Manager, (360) 664-4330
- David Baker, DES Business Initiatives Specialist, (360) 664-4380
- Josh Klika, Procurement and Contracts, (360) 407-6939
- Jeff Kesseler, DES Internal Print Operations, (360) 407-8259

# *Outreach Follow Up Requests and Collaboration Efforts*

- Managed print services training
- Site visits with the departments of:
  - Agriculture
  - Transportation
  - Veterans Affairs
  - Labor and Industries
  - Fish and Wildlife
  - Social and Health Services
- Work session with the State Board of Community and Technical Colleges
  - Communication to the presidents and chancellors
  - Current cost tracking practices

# *Questions?*

# *Key Definitions*

**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 Enterprise Services we call this the *Toolbox of Strategies.***

**Q: What are Managed Print Services?**

**A:** Per WAC 200-380(5) are services offered by an external provider to optimize or manage an organization's document output to meet certain objectives; such as driving down costs, improving efficiency and productivity, or reducing the support workload.

# *Key Definitions Continued*

An agency *in-plant printing operation* has dedicated paid staff and equipment producing a variety of products for internal and/or external use with a fee structure.

- Some operate at cost recovery and others with an allocation or appropriation.
- For some, most of the work is for internal customers, while others produce products primarily for external customers, or a combination of both.

# *Collecting Baseline Print Costs*

*Baseline print costs* include internal use print as well as print procurement.

*Internal use print* or *agency-based printing* means an agency's internal printing, which does not require a private sector print shop or another state agency print shop. *Managed print services contracts* can help track these costs. This type of printing typically includes:

- Day-to-day administrative printing
- Managed print services contracts
- Supplies needed for plotters, copiers, or other multi-function devices and equipment

*Print procurement* includes all printed products done for your agency by your in-plant print operations or other external print shops such as Enterprise Services' print operation in-plant, another agency's in-plant, or a commercial print vendor.

# *Baseline Print Costs*
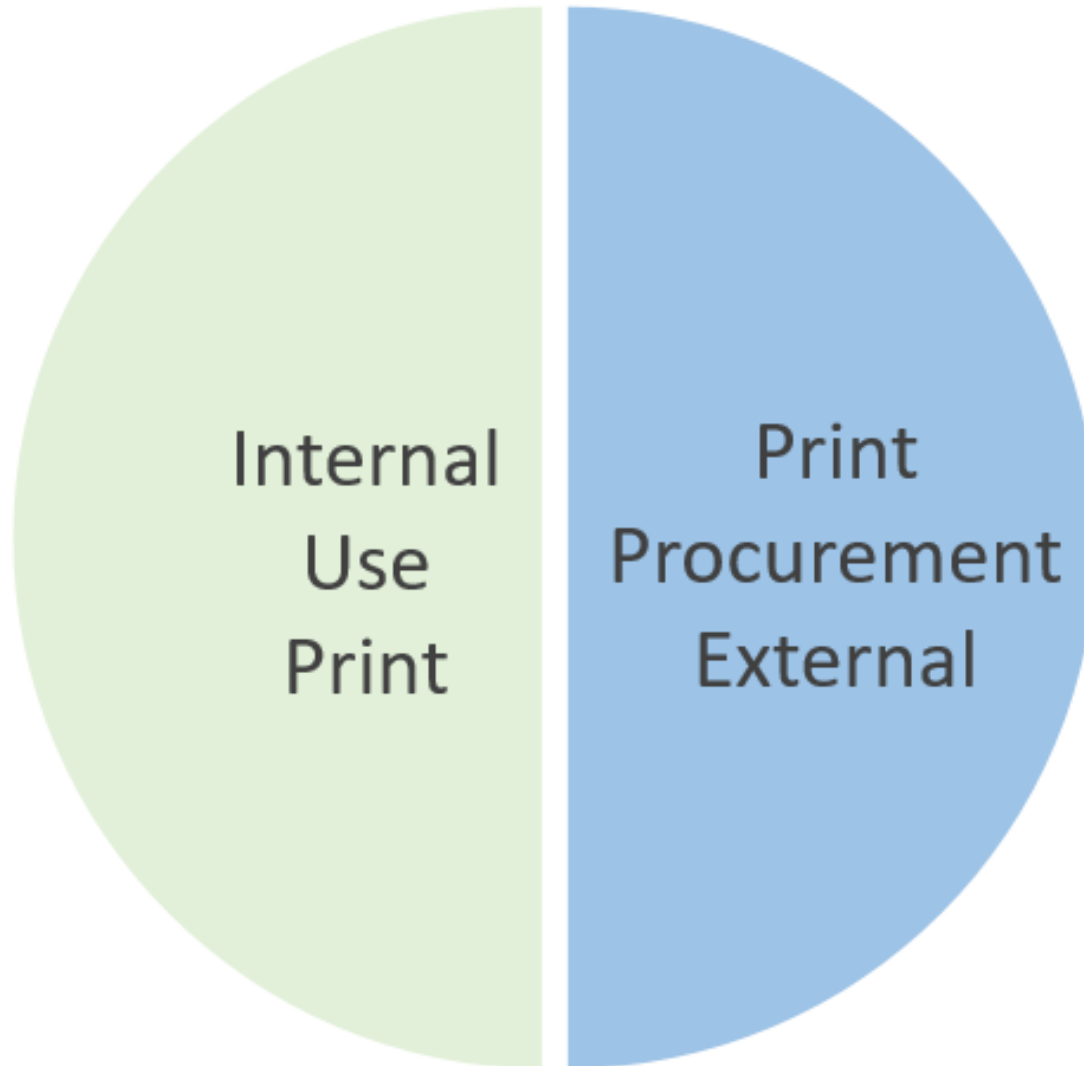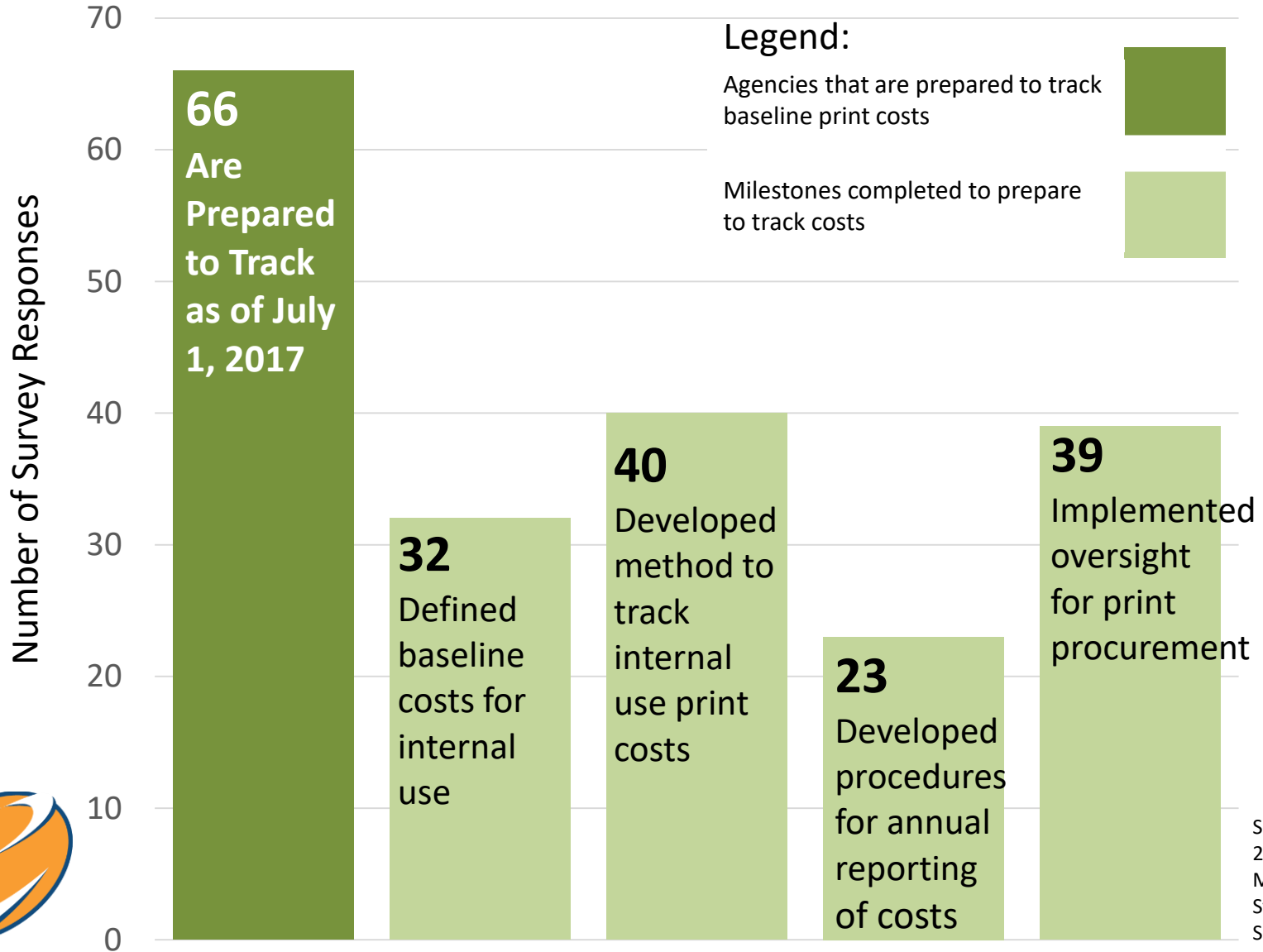
# In Search of Best Practices… We Have Questions

# *2017 Cost Tracking Survey Responses*



Number of Survey Responses

**66 Are Prepared to Track as of July 1, 2017**

**32** Defined baseline costs for internal use

**40** Developed method to track internal use print costs

**23** Developed procedures for annual reporting of costs

**39** Implemented oversight for print procurement

Legend:

Agencies that are prepared to track baseline print costs

Milestones completed to prepare to track costs

Source: 2017 Print Management Status Report Survey

# *How Do We Make Cost Tracking Meaningful?*

- Internal costs
- External costs (procurement)
- Sub object and sub sub object codes
- Consistency follows understanding of current practices
  - across agency departments, regions, districts, campuses, programs
  - across agencies (future state)

# *Categorizing Costs*

| Internal Use Expenditures | Print Procurement Expenditures |
|---|---|
| • Meeting materials<br>• Day-to-day administrative materials<br>• Low volume and simple copies<br>• Communications and Correspondence<br>• Classroom handouts<br>• Multifunction devices and equipment | • Stationery (business cards, letterhead)<br>• Publications such as guides, brochures, pamphlets<br>• Envelopes<br>• Large-format printing such as posters, wall displays, maps, architectural<br>• Forms<br>• Field manuals<br>• Training materials<br>• High volume and or complex Projects<br>• Statements, notices, legal correspondence |

# *Questions and Discussion*

# *Refresher on Print Device Options-Master Contracts*

Options for Customers Utilizing Master Contracts

# *Contract Resources*

- Leverages buying power

- There are several [Master Contracts](#) related to a print environment.

- [https://des.wa.gov/services/contracting-purchasing/current-contracts](https://des.wa.gov/services/contracting-purchasing/current-contracts)

# *What is NASPO?*

**National Association of State Procurement Officials**

- Creates multi-state contracts in order to achieve cost-effective and efficient acquisition of quality products and services.

- These contracts maximize cost avoidance, reduce individual state administrative costs, and encourage market competition and product availability through standard specifications and consolidated requirements.

# *Refresher on Terms*

**Q: What is a Statewide Master Contract?**

**A:** Master contracts leverage the state's collective buying power and are established for most frequently purchased products, making for the best use of resources for all types of Washington governments.

They have met state requirements for competitive bidding and other procurement laws, reducing risk and streamlining the purchasing process for agencies.

# *Contract Resources*

- Leverages buying power
- There are several [Master Contracts](#) related to a print environment.
- The current Master Contract for lease, rental, and purchase of print equipment is [05214 NASPO Copiers, Printer, Related Devices](#)
- The current Master Contract for Managed Print is [00215 NASPO Managed Print Services](#)

# Current Contracts

## Search Contracts

Search results for keywords: **print**

[All Active Contracts ▼] or

[print] [Go]

Enter 1 - 5 keyword(s), contract # or partial vendor name

Click on column heading to sort search results

| Contract # | Contract Title |
|---|---|
| 02012 | ACTIVE FOR MPS REPORTS ONLY |
| 07712 | BULK ENVELOPE PARENT CUT SHEET PAPER |
| 06213 | CARAHSOFT ITSM SOFTWARE & SERVICES |
| 10103 | CI- UMBRELLA CONTRACT |
| 05214 | NASPO COPIERS, PRINTER & RELATED DEVICES |
| 00215 | NASPO MANAGED PRINT SERVICES |
| 06012 | NASPO MOBILE PHONES |
| 01014 | WIRELESS POOLED MINUTES |

**05214 is for:**

- **the lease, rental or purchase of copiers, printers and related devices**
- **software bundles that enable and enhance the devices.**

**00215 is for:**

- **managed print services and not lease, rental or purchase of equipment.**

# *Options for Using a Contract for Managed Print Services*

- **What are the basics?**
- **The Enterprise Services Contract Services Team is here to help you navigate**

# *Managed Print Services Components*

**Per WAC 200-380:**

Main components provided are:

- Needs assessment

- Selective or general replacement of scanning and document capture equipment

- The service, parts and supplies (excluding paper) needed to operate the new and/or existing equipment (including existing third-party equipment if this is required).

# *Some Current Examples of Managed Print Components*

- Multifunctional devices (MFDs)
- Networked printers
- Non-networked/desktop printers
- Plotters/large format devices
- Scanners
- Software

# *Questions?*

# *Best Practices: State Agency*

Please welcome Pamela Hawkins-Hull from Employment Security Department

# *Employment Security Department*

- Form a committee of end users
- Good address and **two** contact names and number
- Good inventory of current devices and dates lease expire
- Limited device options (small, medium, and large)
- Service ticket process
- Give info 1st time and it stays with the call

Pamela Hawkins-Hull

PHawkins@esd.wa.gov

# *Questions*

# *Gearing Up for the 2018 Survey*

## Preparation to Track Baseline Print Costs

# *Categorizing Costs, Including Equipment*

**Internal Use Expenditures**

- **Meeting materials, day-to-day administrative materials, low volume and simple copies, communications and correspondence, classroom handouts**
- Volume of print, copies, & scanning, pages per person / project / program (a.k.a. pull print)
- Multifunctional device (MFD) lease, purchase, and/or rental
- MFD usage costs (click charges paid to vendors)
- Equipment repairs not included in managed print services contracts
- Cost per square foot for printing/copying equipment/paper inventory
- Electricity use for internal print use area and fax lines

# *Categorizing Costs by Agency Structure*

## Print Procurement Expenditures

- Print procurement by administration / division / program / facility / vehicle fleet
- **Stationery (business cards, letterhead)**
- **Publications such as guides, brochures, pamphlets**
- **Envelopes**
- **Large-format printing such as posters, wall displays, maps, architectural**
- **Forms**
- **Field manuals**
- **Training materials**
- **High volume and or complex Projects**
- **Statements, notices, legal correspondence**

# *Tentative 2018 Survey Schedule*

- January 2018
  - Solicit team input on survey content changes
- February – March 2018
  - Agencies run recommended test expenditure reports for the period July 1, 2017 through December 31, 2017
  - Agencies conduct recommended internal print procurement outreach to identify/verify "what" is printed "where" and "how" it is coded

# *Tentative 2018 Survey Schedule, Cont.*

- April 2018
  - Solicit team input on draft survey content
  - Agencies share outcomes of reports and internal discoveries
  - Identify agency volunteers to review future drafts
- May 2018
  - Enterprise Services internal review of draft survey content
  - Share revised draft survey with interested agency volunteers via email

# *Tentative 2018 Survey Schedule, Cont.*

- June 2018
  - Enterprise Services internal review of final survey content
- July 2018
  - Share final survey with agencies
- August 2018
  - Survey opens August 1, 2018
  - Survey closes August 31, 2018 (4 plus weeks = 23 working days)

# *Tentative 2018 Survey Schedule, Cont.*

- September 2018
  - Enterprise Services verifies agency responses and writes draft report

- October – November 2018
  - Enterprise Services consolidates 2018 report for review by the Office of Financial Management

- December 2018
  - Publish the report online

# *Team Input on Survey Schedule*

✓ The proposed schedule is acceptable

# *Cost Consideration Questions Posed to the Team*

- What financial information in addition to internal, external, and the total costs should be included?

- Does it make sense to have a comment box for each agency to describe what their numbers do and do not include?

- We would like to keep the milestone checklist in the survey to showcase progress in the right direction

# *Making 2018 Survey Data Meaningful*

The team would like Enterprise Services to recommend:

- What to include in the financial reports and specifically which Chart of Accounts Sub-Sub Object codes to use.

- What specific expenditure types should be considered internal print use and external print procurement costs?

Internal Use Print

Print Procurement External
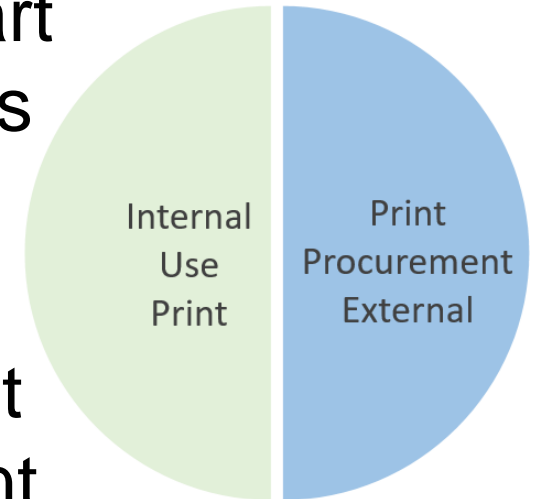
# *Making 2018 Survey Data Meaningful, Continued*

- There was considerable discussion in the January 23rd meeting about how each agency has a unique mission, programs, and needs.

- The team is interested in having the survey designed to capture/allow for these differences, while striving for simplicity and uniformity where it makes sense.

- Support to retain the milestone question was voiced.

# *What are your agency's action items?*

**Questions to take back to your agency include:**

1. Are there existing tracking mechanisms to capture print expenditures already in place?
2. Who in which programs should work to collect the financial data within our agency?
3. Are your accounting and/or purchasing programs currently resources for this effort?
4. Does your agency's Chief Financial Officer need to review/approve the financial related survey content you submit this year?
5. What information is missing from your test expenditure report?

# *Recommended Actions for Success*

- **Consider doing the two recommended tasks in February and March:**
  a. Run a test expenditure report for the period July 1, 2017 through December 31, 2017
  b. Conduct print procurement outreach internally to identify/verify "<u>what</u>" is printed "<u>where</u>" and "<u>how</u>" it is coded

- **Establish/reconvene an internal team and discuss the upcoming survey**

<u>Note</u>: The requirement to report financial information to Enterprise Services comes from WAC 200-380.

Questions?

# *Collaboration to Design the 2018 Survey – Thank You Volunteers!*

**Q**: Is there anyone interested in being involved in further review of the draft survey content via email?

**A**: Yes! This opportunity is not closed, and additional representative are welcome to join these volunteers*:*

- Health Care Authority
- Highline Community College
- Departments of:
    - Financial Institutions
    - Revenue
    - Labor and Industries
- Attorney General's Office
- State Board of Community and Technical Colleges will find a representative from the IT Commission

**Note:** The survey drafts will be shared with all agencies

# *Meeting Wrap Up and Next Steps*

- Enterprise Services will:
  - Coordinate with volunteers on the 2018 survey development
  - Share draft 2018 survey with the full team prior the April Q2 meeting
  - Develop and share a crosswalk table listing the expenditure examples and the corresponding Chart of Account codes available
  - Provide individual agencies, upon request, a summary of print purchased from Enterprise Services (myPrint orders, Production Services, Printing and Imaging)
  - Continue to be available for facilitation assistance to agencies

# *Q2 April Team Meeting Agenda Items*

- Enterprise Services will share:
  - Their internal managed print services contract experience and lessons learned
  - The approach and lessons learned from the test expenditure report and their continuing quest to identify/verify external print procurement practices
  - Draft 2018 survey questions, recap of the input from the volunteers, and solicit additional input from the Team

# Thank you!

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[Josh.Klika@des.wa.gov](mailto:Josh.Klika@des.wa.gov)

[Jeff.Kesseler@des.wa.gov](mailto:Jeff.Kesseler@des.wa.gov)

Print Management resources online:

[http://des.wa.gov/services/printing-mail/printing-services/print-management](http://des.wa.gov/services/printing-mail/printing-services/print-management)