Washington State Department of Enterprise Services

Statewide Print Management Strategies Team

Opportunities for Collaboration – Q3

July 26, 2017 – 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: Wendy Walker, Department of Licensing

Today's Agenda

| Time	Topic		Who
9:00	Welcome – Housekeeping for WebEx	Information	Judy
9:05	2016 Consolidated Annual Print Management Strategies Status Report	Information and Discussion	David
9:15	2017 Print Management Survey	Information and Discussion	David
9:30	Best practices – Guest Presenter Department of Licensing	Information and Discussion	Wendy Walker
9:50	Best practices - Printing Software	Information	Jeff
10:00	Short Break – WebEx users, please mute phones versus "hold" function	ACTION	All
10:10	Statewide Effort to Establish Uniform Cost Tracking Tools (follow up from April)	Discussion	Judy
10:20	Updates on Contracts	Information	Josh
10:25	Wrap Up and Next Steps for 2017 Status Report	ACTION ITEM	Judy

Statewide
Print Management Strategies Team

2016 Consolidated Print Management Status Report

2016 Consolidated Print
Management Strategy
Status Report

June 2017

**Washington State Department of
Enterprise Services**
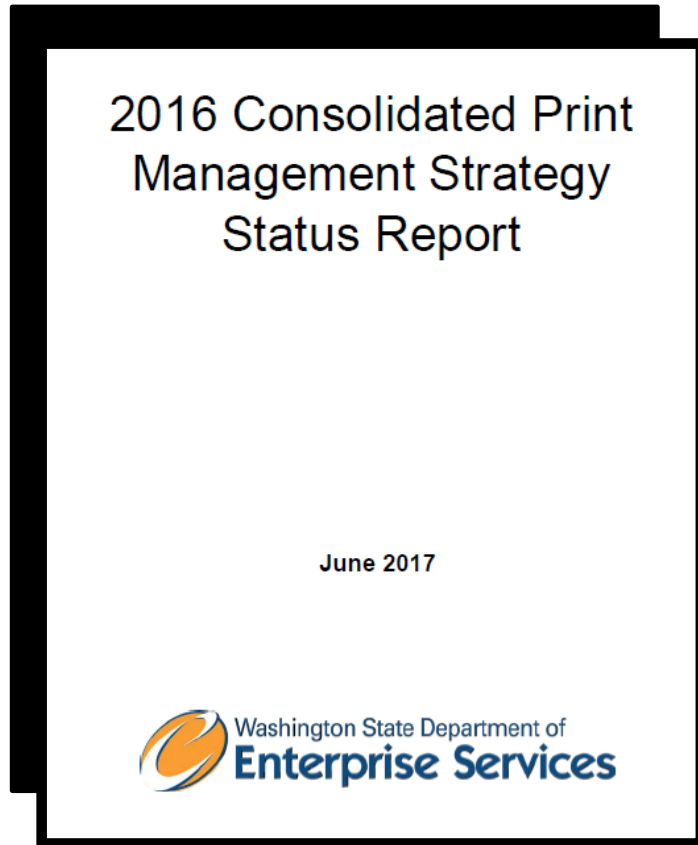
The 2016 consolidated report is now online!

- Established the process and framework for future reports.
- Includes 76 status reports with a brief overview and introduction
- Was reviewed by the Office of Financial Management.

Where to Find the 2016 Report

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
Printing and Imaging Program Updates
Production Services
Resource Center

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.

Creating print efficiencies in Washington

Enterprise Services is guiding state agencies and higher education institutions in complying with new requirements to create economic and efficient print management while focusing on their core mission.

Statewide Print Management Strategies Team
Upcoming meetings

- July 26, 1500 Jefferson, Olympia – 9 a.m. to 10:30 a.m.
- Oct. 24, 1500 Jefferson, Olympia – 9 a.m. to 10:30 a.m.

Previous meetings

April 25, 2017

- Agenda
- Opportunities for Collaboration Quarter 2 presentation

Jan. 31, 2017

- Agenda
- Opportunities for Collaboration presentation

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 43.19.730 – Consultation

- 2016 Consolidated Print Management Report
  Guidelines for managing print operations

5

Printing – Divisions/External Customers

What we've learned:

- "Parent Agencies" Many agencies support boards and commissions as part of their mission.

- Some agencies share physical locations with others and provide access to shared services.

- Many agencies, especially boards and commissions, have less than 9 employees and may have only a single multifunction device.

In-plant Funding and Scope

What we've learned:

- Several large agencies perform print production services for internal and external customers.

- Some are:
  - cost recovery
  - appropriated
  - allocated
  - may be a combination

- Equipment and Services Vary Considerably

Questions?

2017 Survey Overview

- What's new?
- What's the process?
- Will we have results at our next meeting?
- How can we increase participation statewide?
- Who does this apply to?

Reminder: The survey closes August 23rd

2017 Survey Highlights

- You must use the same IP address to save and resume later.
- We will follow up:
  - With new participants
  - On some questions depending on the responses.
- Everyone will be asked to verify their answers prior to publication.

Financial Reporting

- No financial data is requested in the 2017 survey.

- Baseline cost questions will shape future reporting categories.

- Financial data will be needed in the 2018 survey.

- Start tracking $ data now if you haven't already.
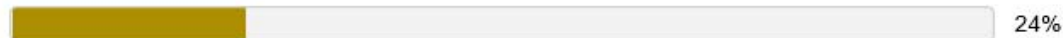
2017 Survey Features

Washington State Department of Enterprise Services

2017 Agency Print Management Strategy Status Report Survey

Topic B. Print Management Implementation Status

"*Print management*" is the overarching general term that applies to the management of an agency printing operations, including agency self-service and supplier generated printed material, services, and/or equipment. WAC 200-380 requires all state agencies, boards, commissions and institutions of higher education to have a print management policy, standards and procedures.

* **8. Has your agency adopted a written print management policy?**

○ Yes

○ No

24%

[Prev] [Next]

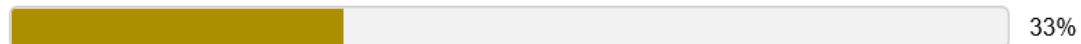# *2017 Survey*

Washington State Department of
Enterprise Services

2017 Agency Print Management Strategy Status Report Survey

Topic B. Print Management Implementation Status

If you answered Yes, please send your print management policies, standards, and procedures to: Printmanagement@des.wa.gov. Electronic submission of adopted policies, standards, and procedures is necessary to fulfill annual reporting requirements.

33%

| Prev | Next |

2017 Survey

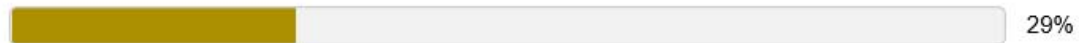**Washington State Department of Enterprise Services**

2017 Agency Print Management Strategy Status Report Survey

Topic B. Print Management Implementation Status

* 9. When does your agency plan to create a print management policy?

○ By the end of fiscal year 2018

○ By the end of fiscal year 2019

○ Other (please describe)

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[                                        ]
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29%

| Prev | Next |

2017 Survey

Washington State Department of Enterprise Services

2017 Agency Print Management Strategy Status Report Survey

Topic D. Determining Baseline Costs

The next few questions relate to the determination of printing baseline costs for your agency. WAC 200-380-030(2) requires agencies to determine "Baseline costs" using life cycle cost analysis as defined by RCW 39.26.010(14).

There is not yet an operational definition of "baseline costs". It should include the overall cost of providing printed products to your staff and customers.

* 16. Is your agency prepared to track baseline print costs and your fiscal year print spend beginning July 1, 2017? More information on baseline print costs...

⬡ Yes

⬡ No

2017 Survey

This text will open in a new window:

Topic D - Baseline Costs, additional information:

Here are some examples of potential measures to track for "baseline costs"

- Volume of print/copies
- Volume of scanning
- Multifunctional device (MFD) lease, purchase and/or rental costs
- Multifunctional device (MFD) usage costs (click charges paid to vendors)
- Equipment repairs not included in service contracts
- Costs associated with paper, toner, staples not included in managed print services contracts
- Fax lines

Here's who has completed as of July 20:

- Skagit Valley College
- Washington State Medical Quality Assurance Commission
- The Board of Industrial Insurance Appeals
- Wenatchee Valley College
- Department of Ecology
- Tacoma Community College
- Economic and Revenue Forecast Council
- Community Economic Revitalization Board
- Washington Hop Commission
- Dairy Farmers of Washington
- Office of Superintendent of Public Instruction
- Everett Community College
- Eastern Washington University

Best Practices

- Please welcome Wendy Walker with the Department of Licensing

- Licensing began print management in autumn 2014

- Licensing has 1,300 employees in multiple locations

Best Practices

- Approach to selecting a vendor
    - It's a long term relationship
- A few considerations:
    - What is your agency culture?
    - How long will this take?
- What does your current print landscape look like?
    - How do the folks in your agency view their printers?
    - How many?
    - Locations?
    - Own, lease- both?
    - Print assessments

Best Practices

Internal Communications

- Frequent and varied delivery methods.

- You have options for purchase!

- Benefits of a second tier solicitation

  - Include stakeholders- IT, users

  - Include agency values

  - Include special terms and conditions

  - Get a better price

Best Practices

The role of your IT group/Help Desk

- How much work will they be doing?

- How much control will they have/want?

- Network permissions- vendor access

- Logging tickets to control the process or full service from vendor?

Best Practices

Billing…

- it may be more challenging than you think.

  - Enterprise budget?
    - Depending on how your agency handles budgets, it is not necessarily cheaper for everyone
  - Good understanding of expenditures?
    - Monthly costs vs annual
    - Paper, toner, services, leases, purchases
  - "Follow Me" software

Questions?

Best Practices: Managed Print Software

Pull Print Software:

- There are many brands to choose from.

- It makes secure print the only option!

- It can be programmed to existing agency ID cards.

- It reduces waste.

- It creates useful reporting tools.

- Your agency does not need to have a managed print contract to benefit from this tool.

Best Practices: Managed Print Software

What if my office only has a couple of printers?

- Print management tracking software

  - Answers the question "who printed what to where"
  - Clearly and easily tracks print volumes and associated costs for each User
  - Makes it easy to learn which applications drive print volumes in workgroups, divisions, and departments

Best Practices: Managed Print Software

Even if your agency isn't looking for these kinds of systems, there are a few basic defaults that can reduce expenses and reduce waste.

- 2 sided printing
- Black only
- Energy saver timer
- Secure or locked print - *this one can be especially important and effective!*

Short Break

For those on the phone, please keep your phone on mute during the break.

Please do not put your phone on hold.
This often plays music over the WebEx and cannot be muted by others.

Thank You.

Using Uniform Cost Tracking Tools

- After our Statewide Print Management Strategies Team meeting in April, Enterprise Services worked with the One Washington Project to identify the best accounting codes for tracking print management expenditures.
- July 1, 2017 to June 30, 2018 will be the first fiscal year for some of the new codes.
- If there are any changes or additional codes they will be adjusted retroactive to July 1, 2017.
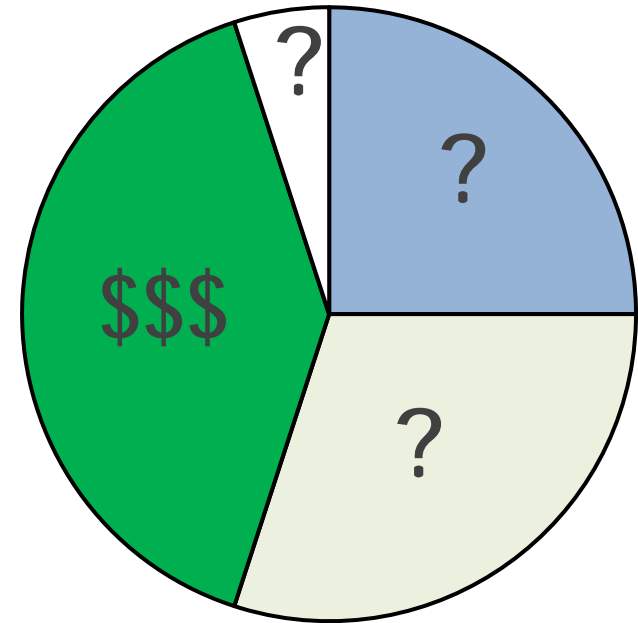- How does this affect my agency?

Defining Print Spend with Current Codes Compared to Proposed Changes

What does your agency spend on printing?

- **Who pays for it?**
- **Who tracks/reports it?**
- **What data is meaningful to track for your agency and to meet the intent of the RCW and the WAC?**
- **What happens next?**

Developing the Baseline Data

Inventory of the fleet includes:

- Multifunction Devices
- Plotters
- Printers
- Copiers

Your agency has this information!

Proposal from Enterprise Services

Proposed Changes to Sub/Sub Objects in the Chart of Accounts for Tracking Print Management Expenditures		
Subobject Code	**Title**	**Definition**
EA A430	Office Supplies	Costs associated with charges for the purchase of library supplies, drafting (architectural) supplies, and other miscellaneous office supplies. Does not include office forms, envelopes, stationery, printer and plotter paper, subscriptions, publications, and books.
EA XXXX	Print Supplies for owned devices, and costs associated with leased multi-function devices (MFD).	For owned devices such as desktop printers and plotters: includes printer and plotter paper, toner, staples, etc. For MFDs, includes paper for the devices.
EA A440	Production Printing Supplies	Costs associated with in-plant production printing supplies, e.g. for DES, WSDOT, DOC/CI, LNI, AG, OSPI, and ESD and/or higher education agencies with in-plant production facilities.
EF	Printing and Reproduction	The amounts expended for contractual printing and reproduction, binding operations, and all common processes of duplication performed by the Department of Enterprise Services' Printing and Imaging, or any agency who has in-plant production facility, e.g. Department of Corrections, internal staffed copy centers or purchased printing and/or inserting services. Includes printed matter such as publications, books, pamphlets, digital and scanned images. Delete: and the cost of office copier supplies
EF F030	Publications	Costs associated with printing agency publications, such as maps, calendars, guides, and brochures. Agency publications that used for marketing purposes, public education, or items for sale.
EF F050	Statements, Notices, and Legal Correspondence	Costs associated with printing and inserting agency communications, including envelopes and stationery; information that state agencies are required to print and distribute to customers/public. Examples include variable data printing of WSDOT Toll bills, DOL driver and vehicle renewals, warrant checks, medical plan coverage summaries, W-2s, etc.
EF XXXX	Documents and Reports	Costs associated with printing documents used for conducting agency business functions. Examples include PDR requests, construction bid documents, and agency reports, etc.
EF FO	Internal Use Print Charges	Costs associated with day-to-day agency use of the managed print service devices, that are direct charged back to the using organization.
FJ J070	Office Supplies-Administration	Costs associated with office supplies, such as notepads, divider pages, pencils, and flip chart paper. Supplies used for operations and not for production or services provided to the customer.

Proposed Changes to Chart of Accounts

Jamie, the Chart of Accounts group reviewed your change request form. We agreed with removing copier supplies for agency owned MFDs from EF, but felt that these costs still fit within office supplies (EA-A430).

We updated the definitions for EF, EF-F030, and FJ-J070 as below.

We have reservations about the new SSOs being requested. During our work with agencies the need to break out these printer and copier costs were not expressed.

Please let me know if you have any questions.

Benjamin

Updated Definitions:

Subobject Code	Title (Limit: 40 Characters)	Definition	For OFM Use Only
EA A440	Production Printing Supplies	Costs associated with in-plant production printing supplies.	
EF	Printing and Reproduction	The amounts expended for contractual printing and reproduction, binding operations, and all common processes of duplication. Includes printed matter such as publications, books, pamphlets, digital and scanned images.	
EF F030	Publications	Costs associated with printing agency publications, such as maps, calendars, guides, and brochures.	
FJ J070	Office Supplies-Administration	Costs associated with office supplies used for operations and not for production or services provided to the customer.	

Using Uniform Cost Tracking Tools

- How do colleges and universities track print expenditures?
- How will each agency answer the question in the survey:
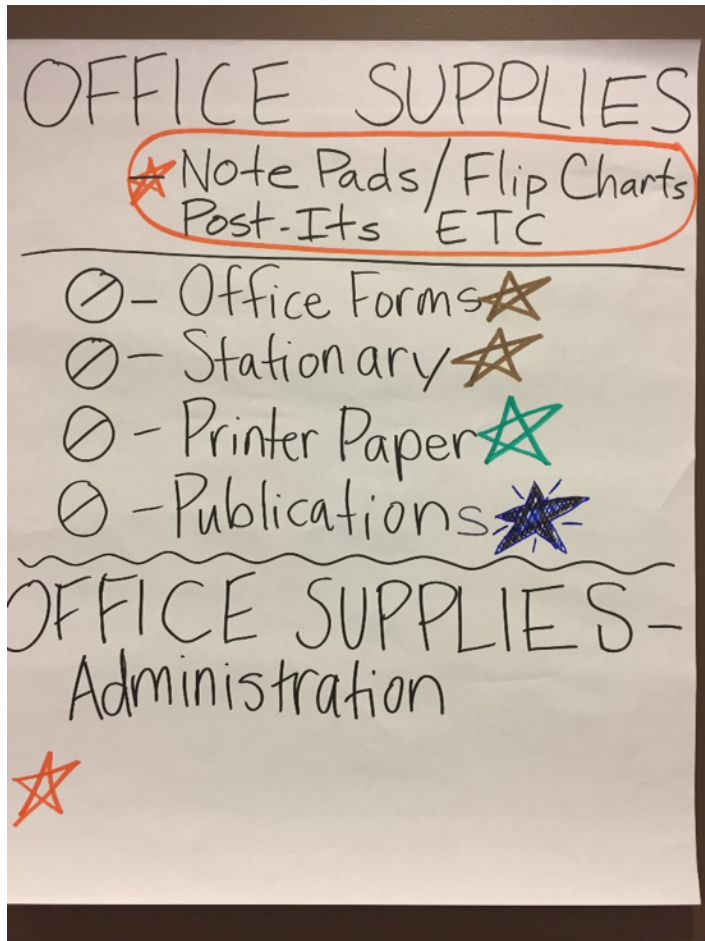
"Are you prepared to track print spend expenditures? "

What's missing?

- Changes to the cost codes in the *Chart of Accounts* need broader support from multiple agencies.

Cost Codes Need More Definition

EA A430:

Does this provide the detail needed to accurately track the baseline cost data WAC 200-380 requires?

Questions and Discussion

- Action item?
- Are there existing tracking mechanisms?
- Do you know who to work within your agency?
- Is there anyone currently involved or interested in being involved?
- Let's look at this in more detail in the future.

Contract Resources

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

Current Contracts

Search Contracts

Search results for keywords: **print**

[All Active] Contracts [▾] or

print [_____] [Go]

Enter 1 - [__] 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

40

Current Contracts

Current Contracts

Questions?

Meeting Wrap Up and Next Steps

What we agreed to today:

1. Enterprise Services will:

   a) Share with the group our progress implementing the Pull Print software solution.

   b) Reach out to ask the group to help define the list of **meaningful** costs to track and report **consistently,** annually, in time for 2018 survey reporting.

   c) Work with OFM and the group to explore opportunities to make additional changes to the Chart of Accounts for tracking purposes

2. Learn how colleges and universities track print related costs

Next Steps for 2017

2017 Survey Schedule:

- July – August survey results verified
- Deadline is August 23, 2017
- Consolidated Report is Published in December 2017

The next quarterly team meeting is October 24th

Thank you!

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Josh.Klika@des.wa.gov

Jeff.Kesseler@des.wa.gov

WeWalker@dol.wa.gov

Print Management resources online:

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