



Statewide Print Management Strategies Team

Opportunities for Collaboration – Q2

April 17, 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 Kessler, Managed Print & Internal Use



Today's Agenda

Time	Topic		Who
9:00	Welcome – Housekeeping for WebEx	Information	Judy
9:05	Implementation Story of Managed Print Part One - Enterprise Services	Information	Jeff Josh
9:30	Policy, Standards and Procedures Enterprise Services Progress Report	Information	Judy
9:50	Gearing Up for the 2018 Survey	Discussion and ACTION ITEM	David
10:00	Preparation to Track Baseline Print Costs Q: What were the results of the test reports? Q: What are the barriers you faced?	Roundtable Discussion and ACTION ITEM	All
10:25	Wrap Up and Next Steps	ACTION ITEM	David



Implementation Story of Managed Print Part One - Enterprise Services



Enterprise Services Managed Print Implementation

Getting started:

- Inventory of printer fleet
- Establish locations, print volume, and costs
- Identify stakeholders including
 - Project manager
 - Security manager
 - Communications/change management resource
- Created goals for new Managed Print Services program

Drafted a Managed Print Multi Function Device (MFD) Replacement Charter

- Executive management sponsor(s) for the project



Implementing Managed Print

Define scope of work

- What are you trying to solve for your environment?
- Printers
- Software
- Workflows



Goals for the Managed Print Solution

- Select a single vendor to provide equipment and service for the entire fleet of approximately 56 printers and associated software
- Implement pull print software on the multifunction devices
- Implement new fax service



Preparing Request for the Vendor Community

Engage the Contracts Division to select a managed print provider

- Review scope of work draft with subject matter experts and stakeholders
- Adjust - what was missing?
- Finalize managed print request and reach out to vendor community



Vendor Selection

Enterprise Services used the NASPO Managed Print contract 00215

- This master contract does not require two tier solicitation
- Vendor selection was based on:
 - Brand reliability
 - Location
 - Diverse business status



Managed Print Services Components from Vendor

- Needs assessment
- Selective or general replacement of printers, scanners, and other Managed Print Service related devices.
- 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).



Needs Assessment

- Quantifying the equipment and usage
 - Vendor can install tracking software for assessment on your network
 - For Enterprise Services, we had enough accurate data to avoid this step
- Reviewing offer response from vendor
 - Compare response to requested needs
 - Sought clarification on offer as needed
 - Negotiate on elements of proposal
- Award Contract



Project Kickoff and Deliverables

- Project Manager assigned
- Weekly status reports
- Security Checklist
- Implementation Plan/Schedule
- Communications Plan
- Change Management Plan
- Training Plan
- Managed Print Policy



Project Evolution

Scope creep

- This can be a good thing as long as it doesn't get out of hand
- Vendors could provide alternatives or additional services
 - Pros and cons of additional services
- Often, new software technology can create a change in workflows
- Director mandate for policy before installation (change to implementation timeline)



Communication Plan

Communications with staff

- Identify changes through email, staff meetings, intranet, etc.
- Offer tutorials on new equipment
 - MFD User Instructions
 - Fax User Instructions
 - Scan back Instructions
- Post how-to info
 - Embedded on intranet portal
- Post helpdesk info
- Schedule for the deployment



Part 2 of the Enterprise Services Managed Print Story, next steps

- Server builds
- Training
- Implementation
- Lessons learned

At a future meeting, we will provide a tour of one of our centralized print rooms





Questions?

Policy Development



Evolution of the Policy Development

- *Print Management Policy*
- *Print Management Standards and Procedures*
- Internal processes
- Organizational structure changes
- Framework and templates

Policy and Standards

adopted this month and available on our [website](#)



Print Management Program Purpose

Enterprise Services

- Improve efficiencies and minimize the costs of agency-based printing
- Establish a framework to guide developing and implementing print management standards and procedures
- Govern agency-wide print procurement and self-service print activities
- Define print management strategies



Print Management Strategies

Enterprise Services

1. Implement a managed print services contract
2. Direct all print procurement to Print and Mail Services for consultation to avoid exceeding thresholds on the internal multifunction devices
3. All print requests, procurements, and expenditures will be tracked and reported



Print Management Policy Statement

Enterprise Services - Excerpts

“Anyone using agency [managed print](#) devices or acquiring print products or services for DES are to read and comply with this [policy](#).”

Every DES [employee](#) is responsible for adhering to the requirements and guidance in this policy, which apply to their specific job responsibilities; the [imaging equipment](#) and computers assigned to them; their printing needs and copying practices and related [print procurement](#) practices.

Human Resources will provide new employees a summary of this policy and its supporting requirements during orientation sessions.”



Standards and Procedures Purpose

Enterprise Services

- **Summarize the agency requirements** governing all aspects of print management as defined by [WAC 200-380-020](#)
- **Provide employees with resources** and best practices to achieve success in learning, and teaching others, how best to obtain printed materials needed to perform their job duties and deliver the agency mission
- **Define core print management strategies**
Enterprise Services is focusing on
- **Guide the implementation**



Standards and Procedures, Continued

- **Establish thresholds** defining the most efficient and cost effective methods for obtaining a variety of printed document/products necessary to deliver the agency mission
- **Outline the roles and responsibilities** of leadership, divisions, and individual employees, including specific roles for several divisions who are tasked to provide the infrastructure
- **Drive actions** that will result in improvements to the agency's financial health and increase its ability to measure efficiencies gained
- **Establish a plan** for compliance with state tracking and reporting requirements



Standards and Procedures

Table of Contents

- Introduction
- Print Management Strategies and Best Practices
- Roles and Responsibilities
- Training Development and Deployment
- Financial Health and Efficiencies - Tracking and Reporting
- Managed Print Program
- Managed Print Operations and Maintenance
- Print Management Program – Print Procurement
- Resources at Enterprise Services



Policy Development Challenges and Solutions

- Scope changes
- Team membership
- Leadership expectations
- Bandwidth of those involved
- Semantics and terminology clarification
- External factors outside team control



Questions?



2018 Print Management Annual Status Reporting Survey

- What does the survey need to include?
- What information would be useful to stakeholders?
- Addressing Baseline Print Costs
- Making it easier



Thank You Volunteers!

Our internal team met with volunteer representatives from:

- Attorney General's Office
- Department of Ecology
- Department of Financial Institutions
- Department of Revenue
- Health Care Authority
- Highline Community College
- Labor and Industries



DRAFT 2018 Survey Questions

- Basic (Agency name, contact info)
- Status of Policy, Standards, Procedures
- Managed Print Services for 1,000+
- Baseline Cost Tracking
- In-plant
- Progress towards implementing print management strategies

- What's missing?



Cost Consideration Questions

- What financial information in addition to internal, external, and the total costs should be included?
- How do we best capture agency and program changes?
- How can we track these extra items as data?



Draft Cost Question

For this reporting period, please quantify your total print spend.

Total print related expenditures

\$ _____

How much of the total costs are **Internal** use

\$ _____

How much of the total costs are **External** print procurement \$ _____



Cost Question – Other

If there are additional factors affecting print related expenditures in your agency, please identify.

For example:

- Significant staff level change
- Change of funding
- Legal requirements related to printed documents
- Program emphasis or curriculum
- Print Services provided by or for another agency
(please identify Agency to avoid double counting)



Questions?



Collecting Baseline Print Costs

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

Internal use print means printing done by your agency, which does not require a private sector print shop or another state agency print shop. 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.



Results of the Test Reports

Q: What were the results of the test reports?

Q: What are the barriers you faced?



Most Common Codes

- Office Supplies (EA A430)
- Printing and reproduction (EF)
- MFD rental/lease (EH)
 - EH H 160 for long term
 - EH H 165 for overages
 - EH H 170 for short term
- MPS (EH H140)
 - EH H150 for overages



Enterprise Services Internal Review

DRAFT

	A	B	C	D	E	F	G	H	I	J
1	DRAFT PRINT MANAGEMENT - FINANCAIL REPORTING CROSSWALK - EXPENDITURE TYPES AND THE CHART OF ACCOUNT CODES									
2										
3		Object	SO	SSO	SSO TITLE	Definition - Source: From the Statewide SSO Table May 2017	Category	Simple Label from Presentations	Internal Use	Print Procurement
4										
5	1	C	CG		Marketing Services	The amounts expended for services to develop or implement a marketing or advertising plan or campaign; services related to marketing or promoting an agency's services or agricultural commodities and state tourism; public relations, market branding; media specialist and media relations services; and market research and development.	Marketing			
6	2	C	CG	G000	Marketing Services	This SSO is for use by agencies that require an SSO on all expenditure transactions. It is the same as using the subobject with no SSO.	Marketing	Advertising		✓
7	3	C	CH		Communication Services	The amounts expended for services to design, develop, and/or provide oversight of audio/video media productions, brochures, manuals, guidelines, newsletters, display exhibits, signs, posters, annual reports, etc.; technical writing/editing; speech writing; oral history writing; grant writing; graphic design services; development of communication strategies; and other related services to inform the public or other governmental agencies about a subject or issue.	Marketing			
8	4	C	CH	H000	Communications Services	This SSO is for use by agencies that require an SSO on all expenditure transactions. It is the same as using the subobject with no SSO.	Marketing	Advertising		✓
9	5	E	EA		Supplies and Materials	The amounts expended for all materials and supplies whether acquired by formal contract or an open account, which are (a) ordinarily consumed or expended within one year after being put into service, (b) converted in the process of construction or manufacture, or (c) used to form an incidental part of noncapitalized equipment or a capital asset.		Meeting materials, day-to-day administrative materials, low volume and simple copies, communications and correspondence, classroom	✓	
10	6	E	EA	A000	Supplies and Materials	This SSO is for use by agencies that require an SSO on all expenditure transactions. It is the same as using the subobject with no SSO.				
11	7	E	EA	A430	Office Supplies	Costs associated with charges for the purchase of library supplies, drafting (architectural) supplies, office forms, envelopes and stationary, and other miscellaneous office supplies. Does not include subscriptions, publications, and books.		Forms, stationery, envelopes may be internal or procured	✓	✓
12	8	E	EA	A436	Paper	Costs associated with charges for the purchase of paper. Available for agencies who choose to track; others use Office Supplies.		Paper	✓	

This is the approach Enterprise Services chose to take for defining the test report components



Enterprise Services Test Report



- What we learned
- What we will do differently
- What we ...?



If you haven't run a test...

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?



If you haven't done your print assessment yet...

- Conduct print procurement outreach internally to identify/verify “what” is printed “where” and “how” it is coded
- Establish/reconvene an internal team – including Finance - and discuss the upcoming survey



Questions?



Meeting Wrap Up and Next Steps

Notifications:

What is the best way to communicate with this group?

- Outlook meeting invitation? **Yes, works well**
- Frequency of email updates
- Topical updates
- Advance notice for future meetings



Next Steps

We agreed to:

1. Send a draft survey out to Agencies for comment
2. Comments on draft survey are due back to Enterprise Services by May 1
3. Identify topic and guest speaker for July 17



Thank you!

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Print Management resources online:

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

