

Fellow Columbia Chapter of NIGP Members:

Our **next General Meeting and Luncheon** is scheduled for **Thursday, November 3, 2016**. Please mark your calendars and plan to attend.

<b>DATE &amp; TIME:</b> Thursday, November 3, 2016 11:30 am – 1:00 pm	<b>LOCATION:</b> Multnomah County Basement - Rm B14 Building 501 SE Hawthorne Blvd Portland, OR 97214
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**LUNCH:**

AGENDA

11:30 Lunch

11:55 Introductions

12:00 **Efficiency through Technology**  
Cate Antisdell, CPPO  
Strategic Sourcing Program Coordinator  
City of Portland – Procurement Services

Cate has been in Procurement at the City and at Portland State University for the last eight years. During this time she has handled solicitations and contracting for Goods and Services and for Construction. Having worked with technology prior to that, she has looked for ways to make her work more efficient through good uses of the applications we have at hand in procurement.

12:45 Chapter Announcements

1:00 Adjourn

**PLEASE RSVP BY TUESDAY, November 1, 2016, BY 12:00 NOON, IF YOU PLAN TO ATTEND to: Stacey Balenger, Logistics Director, [slbalenger65@gmail.com](mailto:slbalenger65@gmail.com)**

*Cost for non-members to attend is \$25.*

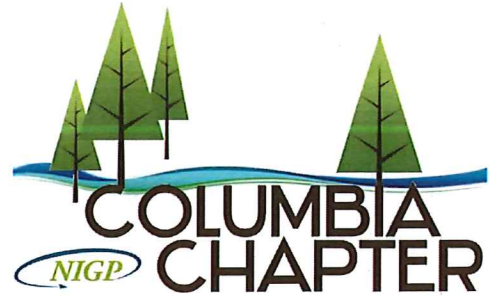


# Sign in Sheet

## Columbia Chapter NIGP

### General Meeting

Date: November 3, 2016 Time: 11:30 AM- 1:00 PM



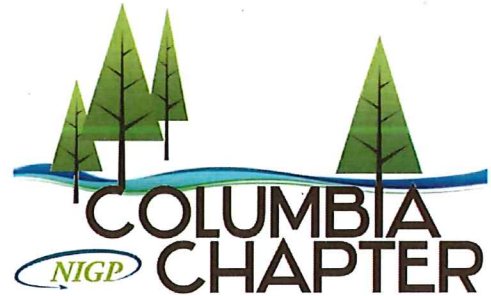
	Name	Agency	Are you a Member?
1	Anthony Belkmon	Multnomah County	yes
2	Cynthia Phillips	City of Port.	yes
3	Theresa a Gurdien	City of Portland	no
4	Shawn Postford	MULTCO	yes
5	Jeff Hasen	MCHD Health	yes
6	Emel Wiedm	TUF&R	YES
7	LAURENCE RUSSELL	MULTNOMAH COUNTY	YES!
8	Caro Antonio	CITY OF PORTLAND	Yes.
9	Paula Rickman	Mult. Co.	Yes
10	HEISEL TRAM	MULTCO	YES
11	Kathi Braeme Burr	MULTCO	yes
12	Doreen Blome	MULTCO	YES
13	Barry Zimmerman	MULTCO	yes
14	Jill Panches	"	"
15	Jane MacMaha	City of Portland	yes
16	Lee Fleming	Multco	yes
17	LENIKA HUTCHENS	Washington County	yes
18	Kendall Cisneros	Port of Portland	soon!!
19	D. Seaton	COP	y
20	D. Henshaw	Port	y

# Sign in Sheet

## Columbia Chapter NIGP

### General Meeting

Date: November 3, 2016 Time: 11:30 AM- 1:00 PM



	Name	Agency	Are you a Member?
21	Lynne White	Multco.	Yes
22	Julie Hoffman	Metro	yes
23	Karen Susarunko	Metro	yes
24	Brian Smith	Multco	Yes
25	Suzi Fulcher	Wash Co	yes
26	Craig Jensen	Port of Portland	yes
27	Jerry Jolusich	Mult. Co	yes
28	Tessa Paul	Mult CO	yes
29	Emilie Schultorf	Mult CO	yes
30	Butzbill	Multco	yes
31	Jamela Slaughter	Mult CO	no
32	Kelly Davis-McKeim	COP	Yes
33	Debra Lindsay	Mult CO	yes
34	Jin Huang	Mult co	yes
35			
36			
37			
38			
39			
40			

**Columbia Chapter General Meeting, November 3, 2016  
EFFICIENCY THROUGH TECHNOLOGY**

**MY SMART GOAL**

I've learned something today that I want to apply

OR

I already knew this stuff, but I bet I could help \_\_\_\_\_ learn this

This could really help me (or my friend):

**Create a Document Template**

**Add Bookmarks to a PDF**

**Bookmark Websites**

**Create File Shortcuts**

**Create Email Templates**

**Make a Checklist**

**Make a Reference Sheet**

Specifically, I want to:

Goal	Time	Importance

• My first SMART goal is to: \_\_\_\_\_

\_\_\_\_\_

• I'll know I've achieved it when: \_\_\_\_\_

• I believe that I can accomplish this goal:

• Achieving this goal is important because: \_\_\_\_\_

\_\_\_\_\_

• My deadline to achieve this goal is: \_\_\_\_\_



**Columbia Chapter General Meeting November 3, 2016 Follow-up Form**

Name: \_\_\_\_\_ Agency: \_\_\_\_\_

Work email address: \_\_\_\_\_

My first SMART goal is to: \_\_\_\_\_

\_\_\_\_\_ My deadline is: \_\_\_\_\_

# Columbia Chapter General Meeting, November 3, 2016

## Efficiency Through Technology

### TEMPLATES

#### 5 STEPS TO SUCCESSFUL TEMPLATES

1. **Supervisor Buy-In** – when your supervisor approves creating and making use of the templates, you are leveraging the efforts of your whole team to use and contribute to making templates
2. **Create Master Documents** – Get input from your team, supervisor and end users, refine until you have all the necessary information, the template is clear and easy to use
3. **Limit Access** – 1. Save the templates in a network folder that has read permissions for everyone but not write (save over) permissions, or 2. Use password protect on each document, or 3. Save the document as a Microsoft Template File so users always get a copy and not the original
4. **Mandatory Use** – Supervisor needs to give clear instruction on where to get the form, making sure users are getting the form at that location every time and not saving it on their computers, and that use of the form in this way is mandatory
5. **Upkeep** – One or two people need to be assigned to the task of making updates to the templates whenever changes are necessary

#### SUGGESTIONS FOR TEMPLATES

1. Pre-Bid/Proposal Meeting Agenda
2. Solicitation Development Form – use to get answers to standard questions you'll need to draft your solicitations
3. Solicitation Timeline – use Excel to automatically calculate time between steps
4. Bid Form – create in Excel with calculations and protected cells
5. Minimum Requirements Checklist – fill in your template with information for each solicitation when you're done drafting it so you don't have to worry about finding the requirements later
6. Proposal Template – have proposers fill out a template to respond to an RFP instead of creating their own - It's easier for them, and a LOT easier for your evaluators
7. RFP Evaluation Plan – checklist of every step from drafting to sending executed contract
8. Infrequently used documents – add user prompts to make the template easy to complete
9. Internal routing forms/Special request forms

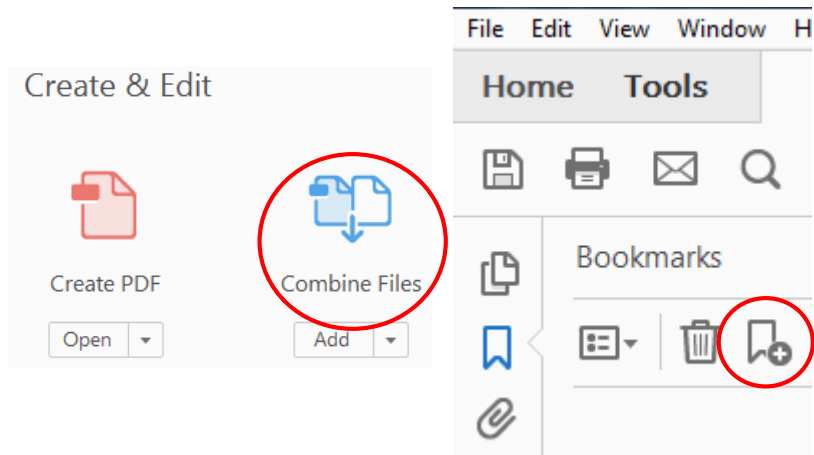
#### TEMPLATE RESOURCES

1. State of Oregon Templates: <http://www.oregon.gov/das/Procurement/Pages/Template.aspx>
2. NIGP Document Library, search "template" or "contract" then Refine by Topic on the left: <http://www.nigp.org/home/find-procurement-resources/document-library>

## BOOKMARKS

### ADOBE PDF BOOKMARKS


1. Use the Combine feature to combine the contract with all exhibits and attachments (image are showing Adobe Acrobat DC)
2. Navigate to the first page of each section you want to bookmark
3. Create a bookmark and name it




### WEBSITE BOOKMARK SUGGESTIONS:

1. **Your team's website pages:** homepage, forms, directory
2. **Often used pages:** State Business Registry, IT helpdesk, legal authority (Council, Auditor), COBID
3. **Rules and Regulations:** agency code/charter/policies, state statute, federal regs, BOLI, QRF
4. **Cooperative Purchasing Resources:** Chapter ICP website, ORPIN, ProcureSource, NASPO, HGACBuy, NJPA, NIPA, US Communities, TCPN, local agency links: City of Portland, MultCo, Port of Portland, Metro, Portland Public Schools, City of Seattle
5. **Procurement Training and Resources:** Internal agency training, NIGP, OPPA, Columbia Chapter, ISM, NASPO, UPPCC, iLearnOregon, CIPS, CPPC CCMP, NCMA, NPI, SCMA, Responsible Purchasing Network, NCPCC

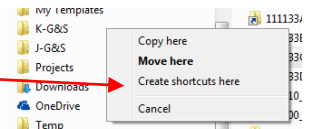
## FILE SHORTCUTS

1. Open Windows Explorer  and navigate to the folder or file you want to create a shortcut to
2. Drag and drop it into the top left under Favorites
3. Navigate to any folder or file easily by opening Windows Explorer and clicking on the shortcut you've put under Favorite

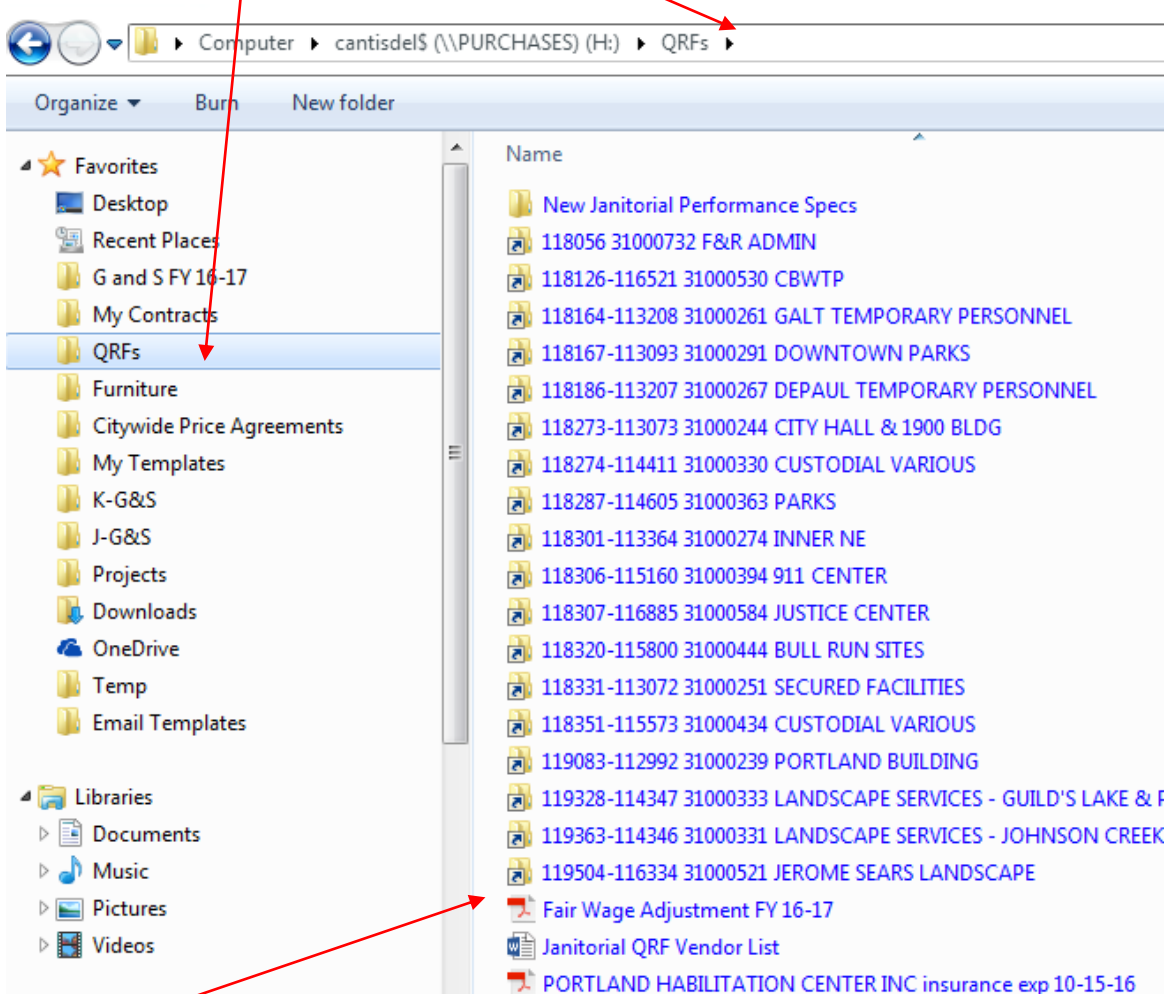
This icon  tells you it's a shortcut to a file, not the file itself.

### **Create groups of shortcuts such as: My Contracts, My Templates, specific Network Folders, etc.**


1. In your personal drive on the network, create a folder you want to put your group of shortcuts in
2. Drag this folder to the Favorites
3. Add shortcuts to the folder by RIGHT clicking and dragging to the folder, then choose "Create shortcuts here"



When you click on a folder in your Favorites, the location or file path of that folder is shown at the top




The contents of the folder are shown in the window on the right

This folder contains shortcuts  to these files that are in all different locations on the network.

It also contains folders  and documents   

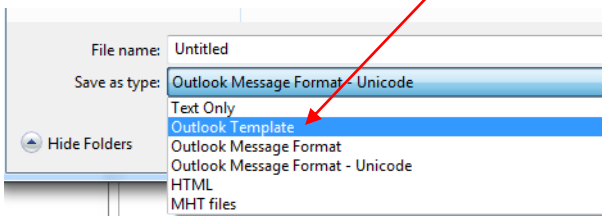
## EMAIL TEMPLATES

### One time:

1. Open Windows Explorer  and navigate to a place on the network that you want to keep your Email templates
2. Create a new folder and name it Email Templates
3. Drag the Email Templates folder to your Favorites to create a shortcut

### To create the email template:

1. Open a new email
2. Write your email and check it thoroughly since you'll be sending it over and over
3. Delete your signature line - it will be added when you use the template
4. Attach any files referenced in the email
5. Add Subject Line and email addresses if it will go to the same person(s)
6. Go to File/Save As
7. Change the Save as Type to Outlook Template (.oft file)



8. Click on your Email Templates shortcut in Favorites
9. Give it a File Name and Save

### To use an email template:

1. Open Windows Explorer
2. Click on your Email Templates shortcut in Favorites
3. Double click on the name of the email you want to send
4. Make any changes necessary and hit send!

### Possible Email Templates

