

Date	01/19/2016	Time	10 a.m. – 12:15 p.m.
Location	Department of Management Services 4050 Esplanade Way, Room 235		
Objective	Monthly update meeting with People First Team and Florida PALM Project Team		
Attendees	<ul style="list-style-type: none"> • Eric Adair (DFS) • Jimmy Cox (DMS) • David DiSalvo (DMS) • Charles Ghini (DFS) • Julian Gotreaux (DFS) • Danielle Kosberg (DFS) • Lisa Hopkins (AST) • Shelly McCabe (AST) • Stu Potlock (DFS) • Angie Robertson (DFS) • Andrea Simpson (DMS) • Christina Smith (DFS) • Melissa Turner (DFS) 		
Attachments/ Related Documents	N/A		
Action Items	<ul style="list-style-type: none"> • Provide a summary of the People First ITN procurement process to the Florida PALM Project Team – David DiSalvo (DMS) • Work with DIS and A&A to setup next meeting and determine agenda on operations – Melissa Turner (DFS) 		

- **Introductions & Agenda: Facilitated by Danielle Kosberg (DFS)**
- **Discussion of People First Procurement: Facilitated by David DiSalvo (DMS)**
 - The discussion focused on several key items:
 - The People First procurement timeline, important procurement events, and the evaluation process
 - How Subject Matter Experts (SMEs) were utilized SMEs were called on by individual evaluation team members for assistance (one-on-one conversations) but not shared with the evaluation team
 - How the evaluation and negotiation team members were selected:
 - Preparation for both teams
 - Communication restrictions between the People First Team, the evaluation team, and the negotiating team
 - Contract negotiations
 - Ten tactics the People First Team used that lead to a successful procurement
 - Lessons Learned:
 - Release the Invitation to Negotiate (ITN) six months sooner to ensure sufficient time for transition / implementation
 - Ensure essential reviewers (e.g., contract reviewers) are looped in earlier in the process (don't assume they are being included by their respected representatives)
 - Other discussion points included:
 - No specific appropriation was requested for the new contract prior to release of the ITN

- The People First procurement followed the schedule listed in ITN through August making adjustments at that point to extend for negotiations
 - Focus groups were held with the State agencies to solicit and review requirements
 - KPMG compiled the evaluation team scores, not the DMS procurement office
 - A draft of the contract was shared with vendors, however feedback was not requested as part of the initial response to the ITN
 - KPMG was asked to perform research during procurement; this information was given to the DMS negotiation team as part of strategy meetings
 - Evaluator and negotiator qualifications were provided to the DMS Secretary as part of a DMS memo
 - The DMS Departmental Purchasing Director's memo to the DMS Secretary identified who to begin negotiation with
 - The negotiation team owned edits to the scope of work (SOW) following the initial reply (instead of vendors)
- **Open Discussion**
 - Melissa Turner polled the team and determined the next meeting would focus on operations.