

From: [HOUSE Nameun * OED](#)
To: [FRIESEN Lori L * OED](#)
Subject: RE: ID.me comments to contract
Date: Wednesday, February 3, 2021 7:43:46 AM

Good morning Lori,

Thank you for your time and work on this project. You are doing a great job and I will respond to you in a precise, efficient manner that can help you track procurement process of the project.

Have a great day.

Nameun House, OPBC, OSPC | Procurement and Contract Specialist | **Oregon Employment Department** | 875 Union Street NE, Salem, Oregon 97311 | Phone: **971-375-3484** | Nameun.House@oregon.gov

From: FRIESEN Lori L * OED <Lori.L.FRIESEN@oregon.gov>
Sent: Tuesday, February 2, 2021 7:20 PM
To: HOUSE Nameun * OED <Nameun.HOUSE@oregon.gov>
Subject: RE: ID.me comments to contract

Hi Nameun,

Thank you for reaching back out. I've been thinking about our email conversation all day. The initial goal to finalize the contract was a goal and it is not your fault we missed it. If I portrayed that in any way I am sorry. My intent has only to know the status of the project pieces so I could keep coordinating and making adjustments. I had to preschedule the kickoff to ensure the appropriate staff were available and when it looked like the contract might not be finalized, I knew it needed to be moved.

These things often happen which is why it works well when the PM is the SPOC to anticipate the changes coming; mitigate them along with the risks so the project pieces can be re-coordinated accordingly. I get a sense that project management is still fairly new overall within state agencies including OED. The speed that projects are moving right now and the priority of them is definitely new for everyone.

I hope we can continue to learn from one another. Please know that I don't question your work. When I ask questions I'm coordinating other pieces that move after your piece. I hope you have a great rest of the week

Thank you,
Lori

From: HOUSE Nameun * OED <Nameun.HOUSE@oregon.gov>
Sent: Tuesday, February 2, 2021 3:51 PM
To: FRIESEN Lori L * OED <Lori.L.FRIESEN@oregon.gov>
Subject: RE: ID.me comments to contract

There are many going back and forth rounds for negotiations and other factors (authorities review and approval) that impact procurement process. So I could not give you the immediate answer you were looking for, so that is why I provided a list of possible steps. I apologize for not meeting your deadline set up with the vendor for kick off meeting. I have listed answers as best as I can.

This is the first time in my procurement career that I have been asked to answer a specific date the contract can be executed during negotiation to meet a kick off meeting (which is considered as “work”) schedule, so it must be a new trend in project management I have not experienced yet for expedited services. In procurement, there is an emphasis to ensure no work is being performed prior to a contract execution because it is considered as debt owed to the contractor under Oregon constitution. I apologize for addressing it from limited scope of procurement and legal perspectives, instead of looking at the project with a holistic view from the project management perspective (which you are the expert in the field). I hope I will gain a lot of many tools and knowledge from the OPMCP training.

From now on, I will give you yes or no (or even I don’t know as an answer) and short, definite answers for clarify. I recognize my explanation is too much and does not provide you direct answers you need.

I am working on improvement and hope you be patient with me. Thank you and have a great evening.

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From: FRIESEN Lori L * OED <Lori.L.FRIESEN@oregon.gov>

Sent: Tuesday, February 2, 2021 11:28 AM

To: HOUSE Nameun * OED <Nameun.HOUSE@oregon.gov>

Subject: RE: ID.me comments to contract

Hi Nameun,

Wow, thanks, but I don’t need to get into the weeds. Here are my original questions:

“Good morning Heather and Nameun.

Can you tell me how likely this is to be finalized by tomorrow?

I could not give you the answer because I didn’t know how Heather would view the ID.me’s response – which affected the response time. Now Bill is reviewing the risk of removing “work product” and that adds additional time.

Does this need to go to the Bill and Lindsi for another review? Heather is waiting on Bill review before she cleans out the contract for ID.me’s review. Or just legal?” ID.me’s legal – Yes, ID.me’s legal will review what we send after Heather and Bill reviewed (and Lindsi got a message re removal of “work product” definition) and determine whether or not they will accept the contract terms. That could take time – hopefully it can get done fairly quickly, but it all depends on ID.me’s legal.

I’ll wait for Heather.

Thanks!
Lori

From: HOUSE Nameun * OED <Nameun.HOUSE@oregon.gov>
Sent: Tuesday, February 2, 2021 11:19 AM
To: FRIESEN Lori L * OED <Lori.L.FRIESEN@oregon.gov>
Cc: WYLAND Heather E * OED <Heather.E.WYLAND@oregon.gov>; JONES Kristin K * OED <Kristin.K.JONES@oregon.gov>
Subject: RE: ID.me comments to contract

Hi Lori,

Here is a list of what would happen once Heather reviews all of the ID.me's language and revisions related to the project and changes to our standard contract provisions to determine which terms can or can't be accepted by OED. There are steps before executing this contract to start working with ID.me.

- The contract with our accepted terms (not finalized yet) will go back to ID.me [I will send it].
- I will ask ID.me if they would accept the terms in the draft for finalization. I will explain to ID. Me, if they accept the contract written as provided, we can finalize the contract (does not mean it is executed – all parties must sign and all the required documents must be submitted for execution) and the ID. Me can send (1) the signed contract (again, this is not executed), (2) a completed letter of assurance – criminal background check, and (3) a completed independent contract certification form.
- Mere will forward the contract to ID.me's legal for review and approval or disapproval.
 - If ID.me's legal has any issues or cannot accept the standard contract terms, ID.me will contact us – this can be resolved with emails or phone calls for clarification (*still we are negotiating – this can affect timeline*).
 - If ID.me's legal would accept the contract, ID.me will send the signed contract, a completed letter of assurance – criminal background check, and (3) a completed independent contractor certification form to OED.
- Upon receipt of ID.me signed contract with the completed letter of assurance and independent contractor form, I will forward the documents mentioned with ID.me's W-9, certificate of insurance, SAM exclusion report (0), EIS approval on ITI, and approved PRF to Ali (Mike Smith, CFO) for Mike's review and signature. I will do an urgent request to Mike.
- Once Mike reviews and executes the contract by signing on behalf of OED.
- I will send the executed contract and an email to ID.me and OED team a Notice of Execution/Notice to Proceed. Then, OED can start working with ID.me (e.g. kick off meeting to start with).

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From: FRIESEN Lori L * OED <Lori.L.FRIESEN@oregon.gov>
Sent: Tuesday, February 2, 2021 10:45 AM
To: HOUSE Nameun * OED <Nameun.HOUSE@oregon.gov>
Cc: WYLAND Heather E * OED <Heather.E.WYLAND@oregon.gov>; JONES Kristin K * OED <Kristin.K.JONES@oregon.gov>
Subject: RE: ID.me comments to contract

Hi Nameun,

I still need to know the next steps and estimated timing. If it is likely that the contract will not be finalized by tomorrow. I need to move the kick-off meeting asap and coordinate a new time with several internal staff and vendor staff.

Heather said she's done with training around 11:30 and will get w/me then.

Thanks!
Lori

From: HOUSE Nameun * OED <Nameun.HOUSE@oregon.gov>
Sent: Tuesday, February 2, 2021 10:31 AM
To: FRIESEN Lori L * OED <Lori.L.FRIESEN@oregon.gov>
Cc: WYLAND Heather E * OED <Heather.E.WYLAND@oregon.gov>; JONES Kristin K * OED <Kristin.K.JONES@oregon.gov>
Subject: RE: ID.me comments to contract

Hi Lori,

You are doing great! We'll check in and follow up with each other to help each other get through this emergency project. Thank you!

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From: FRIESEN Lori L * OED <Lori.L.FRIESEN@oregon.gov>
Sent: Tuesday, February 2, 2021 10:19 AM
To: HOUSE Nameun * OED <Nameun.HOUSE@oregon.gov>
Cc: WYLAND Heather E * OED <Heather.E.WYLAND@oregon.gov>; JONES Kristin K * OED <Kristin.K.JONES@oregon.gov>
Subject: RE: ID.me comments to contract

Thanks for catching that Nameun. I thought I took her out of the conversation and missed that. Yes, I understand the importance of communication and having the appropriate roles communicating the appropriate information.

With that said, please remember I still need to learn/know the process and timing of what I don't know so I can continue to work on the project logistics as the Project Manager and Single Point Of

Contact (SPOC). As I've discussed with you previously, there are Process, IT, Vendor, timing, Exec updates, meetings, and other logistics I need to piece together. It is my job to ask these questions and I need you to let me ask what I don't know and let me be the project SPOC. Due to the priority of this and importance of the right folks to attend, I need to preset whatever meetings I can to ensure the availability of all the right folks.

I need to know the process and timing.

Thanks for understanding!

Lori

From: HOUSE Nameun * OED <Nameun.HOUSE@oregon.gov>
Sent: Tuesday, February 2, 2021 10:02 AM
To: FRIESEN Lori L * OED <Lori.L.FRIESEN@oregon.gov>
Cc: WYLAND Heather E * OED <Heather.E.WYLAND@oregon.gov>
Subject: RE: ID.me comments to contract

Hi Lori,

Just a reminder - You may not include Mere (contractor) in our internal process conversation. We are still in negotiation (in the draft, you shall see there are provisions other than pricing information being discussed and our DPO needs to make sure the standard language for Oregon are not so much removed or altered by the contractor).

Yesterday we have already responded to Mere that we would get back to ID.me on the matter after review, so ID.me needs to wait for our review and approval. Let's wait for Heather (DPO)'s approval and process.

Thank you!

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From: FRIESEN Lori L * OED <Lori.L.FRIESEN@oregon.gov>
Sent: Tuesday, February 2, 2021 9:52 AM
To: HOUSE Nameun * OED <Nameun.HOUSE@oregon.gov>; Mere Work <mere.work@id.me>; WYLAND Heather E * OED <Heather.E.WYLAND@oregon.gov>
Subject: RE: ID.me comments to contract

Good morning Heather and Nameun.

Can you tell me how likely this is to be finalized by tomorrow?

Does this need to go to the Bill and Lindsi for another review? Or just legal?

Lori

From: HOUSE Nameun * OED <Nameun.HOUSE@oregon.gov>
Sent: Monday, February 1, 2021 8:40 AM
To: Mere Work <mere.work@id.me>; WYLAND Heather E * OED <Heather.E.WYLAND@oregon.gov>; FRIESEN Lori L * OED <Lori.L.FRIESEN@oregon.gov>; VILLANI David * OED <David.VILLANI@oregon.gov>
Subject: RE: ID.me comments to contract

Good morning Mere,

Thank you so much for forwarding the draft contract with the ID.me's legal language to address the pricing matter.

We will get back with you on this after our executive's review.

Please let me know if you have any concerns or questions.

Nameun

Nameun House, OPBC, OSPC | Procurement and Contract Specialist | **Oregon Employment Department** | 875 Union Street NE, Salem, Oregon 97311 | Phone: **971-375-3484** | Nameun.House@oregon.gov

From: Mere Work <mere.work@id.me>
Sent: Friday, January 29, 2021 3:58 PM
To: HOUSE Nameun * OED <Nameun.HOUSE@oregon.gov>; WYLAND Heather E * OED <Heather.E.WYLAND@oregon.gov>; FRIESEN Lori L * OED <Lori.L.FRIESEN@oregon.gov>; VILLANI David * OED <David.VILLANI@oregon.gov>
Subject: ID.me comments to contract

Hi OED team,

Apologies for the delay--it has been a bit of an insane week! I spoke with our legal team and added the following language to pricing:

- *ID.me will not charge Agency for detected Synthetic Identity Fraud, to include identities created and verified with a mix of real and stolen and or false information.*
- *ID.me will charge Agency for detected Socially Engineered fraud, to include individuals who verify through job, romance, financial or other schemes, as those individuals do indeed exist.*

Additionally, our legal team does request to exclude 9.1.5 and 9.2 (see attached). Please let me know if you have additional questions--we work weekends and can turn something around (probably) or have a meeting Monday with counsel if that is needed. I know we're trying to get this in place ASAP and I do apologize on the delays on our side.

Thank you!

Mere Work

Senior Account Executive

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McLean, VA, 22102

mere.work@id.me



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