

Procurement

A Continuing Saga...

Procurement

*Value-add and mission
critical*

Presented by

Erma Baker,

CPPO, VCCO, VCO, CUPO



FORUM2014

UMW At-A-Glance

Headcount	4536
FTE	3987
Employees	1022
Residential Population	2376
Degrees Conferred	1288 in FY13
Buildings (occupy)	100 / 2.2 million sq. ft.
Budget	\$112 million
Endowment	\$46 million

Premier Small Public Liberal Arts Institution



Mission Critical



Mission

The mission of Business Services is to support the educational environment of academic excellence and to provide service to all constituent communities, consistent with the mission of the University of Mary Washington. The expectations of the division shall include:

- Value to customers through excellent customer service
- High quality products and at competitive prices
- Efficient and effective management practices to enhance and preserve university resources
- Implement sustainable practices (socially, fiscally and environmentally) wherever possible
- Strive to make a positive impact in students' lives daily, value student satisfaction and encourage campus engagement

Shelby Duff, Procurement Services Intern, Fall 2013

The Saga Begins

- Quality Control

Staffing

IT Procurement Standards

Contract Checklist / Fresh Eyes Review

Survey Instruments

Contract Management System

Contract Administration

- Analytics

SWaM

Annual Report

Savings

- Procurement as a Value-Add Operation

CRM approach

Opportunity Seeking

Share Results (Reverse Auction)

Cooperative Contracts (cost avoidance)

Communication



It's All In the Name

From Purchasing to Procurement Services!



Then and Now

- Staffing level 2009

- Director
- Buyer

- Staffing level 2014

- CPO
- Asst. Director
- 3 Buyer Specialists
- 1 Buyer (shared)
- 1 CSA

Quality Control

Staffing – Addition of Customer Service Advocate

IT / Procurement Standards

Contract File Organization / Fresh Eyes Review

Surveys / Feedback

Contract Management System (CobbleStone)

Contract Administration



Staffing Level

Establishing a Procurement Process with Relevant Purchasing Categories

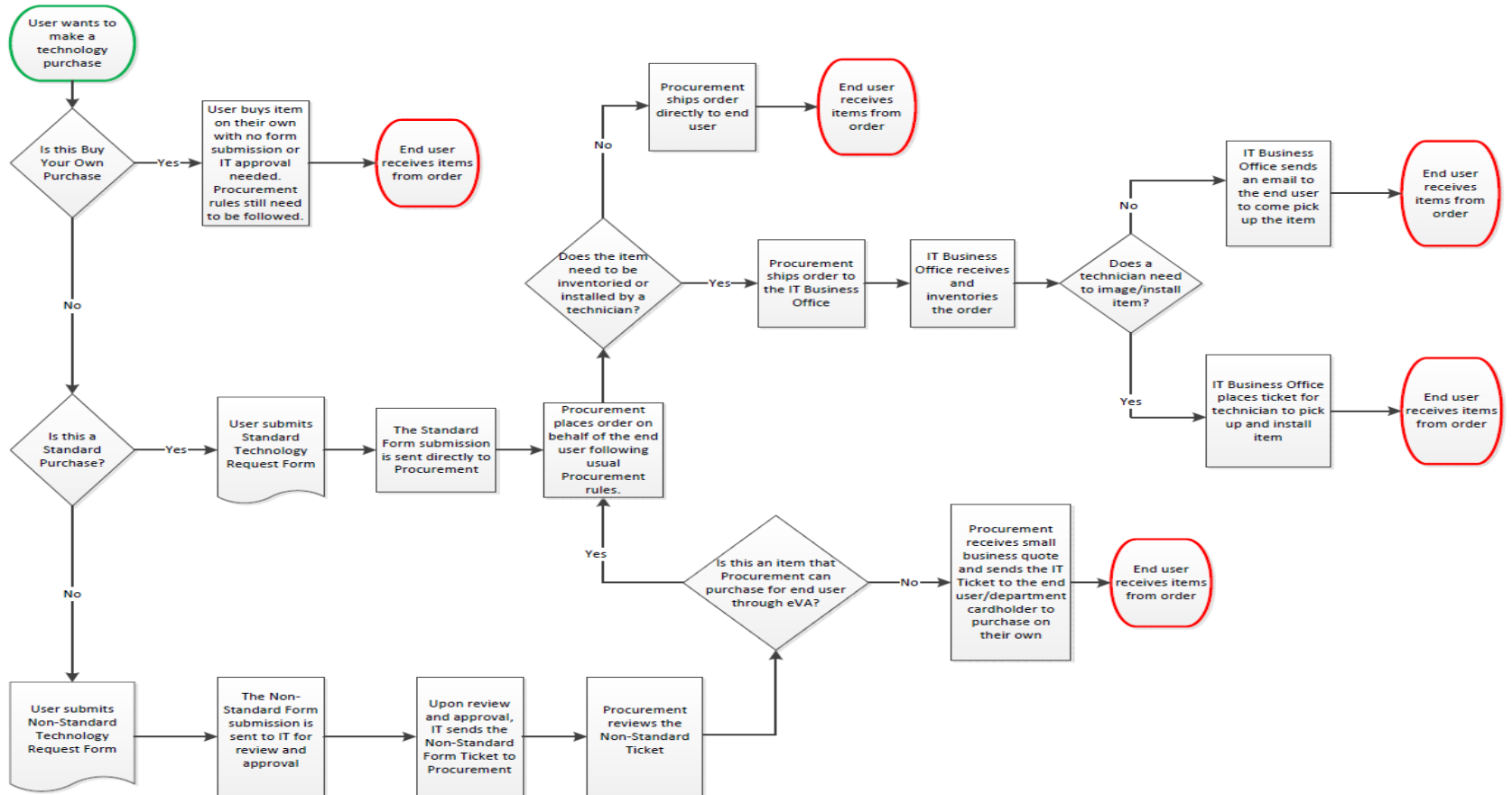


CSA Outreach

Customer Service Advocate On-Site Questionnaire

1. What type of Procurement activities does your department specialize in?
2. How many unregistered vendors do you use?
3. Do you use the Purchasing website?
4. How is your experience with purchasing tools (eVA, SPCC)?
5. Have you ever had any trouble finding a commodity code in eVA?
6. How many term contracts does your department use and how is your experience in collaborating with the Procurement Services office?
7. How can we add value for your department?
8. Do you see any future needs in your department that our department can assist with?
9. What challenges can we help you overcome?

IT Procurement Standards



IT Procurement Standards

The screenshot shows the University of Mary Washington Procurement Services website. At the top, there is a navigation bar with various service icons: EagleNet, Banner, Canvas, Email, Library, EagleOne, eVA, EagleEye, Passwords, Directory, Starfish, and Helpful Links. Below this is the University of Mary Washington logo and a search bar. The main heading is "Procurement Services". A secondary navigation bar includes "Technology Purchases", "Current Bids & Proposals", "Vendors", "Green Purchasing", and "SWaM and Non-SWaM Reporting". A left sidebar menu lists various procurement-related items such as FOAPAL Information, Buy Your Own, Standard Purchases, Non-Standard Equipment and Software Purchase Request, Procedures, Forms, Training, Small Purchase Credit Card, Directions and Maps, How Are We Doing?, Frequently Asked Questions, and Contact Us. The main content area features a large image of a university building, a "MISSION STATEMENT" section, and a "DEPARTMENTAL OBJECTIVE" section. On the right, there is a "New Contract Management System" announcement with a magnifying glass icon, stating "CobbleStone is now LIVE!" and providing details about the system. Below this is an "Announcements" section with a "Latest News and Updates" link, and a "October 2014 eUpdate" link. At the bottom left, there is a logo for "eVA Virginia's".

EagleNet EagleNet Banner Canvas Email Library EagleOne eVA EagleEye Passwords Directory Starfish Helpful Links


UNIVERSITY OF MARY WASHINGTON UMW This Site People Search

Business Services

Procurement Services

Technology Purchases Current Bids & Proposals Vendors Green Purchasing SWaM and Non-SWaM Reporting

FOAPAL Information
Buy Your Own
Standard Purchases
Non-Standard Equipment and Software Purchase Request
Procedures
Forms
Training
Small Purchase Credit Card
Directions and Maps
How Are We Doing?
Frequently Asked Questions
Contact Us



MISSION STATEMENT

It is the design and purpose of the University of Mary Washington's Procurement Services department to assist the University community in the procurement of all goods and services.

DEPARTMENTAL OBJECTIVE

New Contract Management System
CobbleStone is now LIVE!
UMW has a new contract management system, by Cobblestone Systems. This system will assist in managing contract(s) for the University. Visit the Contract Gateway ... >

Announcements

Latest News and Updates >
October 2014 eUpdate

eVA Virginia's

IT Procurement Standards

EagleNet EagleNet Banner Canvas Email Library EagleOne eVA EagleEye Passwords Directory Starfish Helpful Links

UNIVERSITY OF MARY WASHINGTON UMW This Site People Search

Business Services

Procurement Services

Technology Purchases Current Bids & Proposals Vendors Green Purchasing SWaM and Non-SWaM Reporting

Central Storeroom/Surplus You are here: Home / Technology Purchases / Standard Purchases
 UMW Contract Portal
 Contracts
 Vendors
 Laws, Policies and Procedures
 Forms
 Training
 Small Purchase Credit Card
 Directions and Maps
 How Are We Doing?
 Frequently Asked Questions
 Contact Us

eVA Virginia's eProcurement Solution!
Works Bank of America - Small Purchase Credit Card

Purchasing Dates and Deadlines

October 2014

M	T	W	T	F	S	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Standard Purchases

Standard Technology Purchases

Please use the form below to request items on the Standard IT Purchases list. Please review some [important guidelines](#) on orders requiring multiple FOAPALS. Note that this form **cannot** be saved. If you need assistance please contact Procurement Services at procure@umw.edu.

Please use the form below to request items on the Standard IT Purchases list. Please review some important guidelines on orders requiring multiple FOAPALS. Note that this form cannot be saved.

DISCLAIMER!
 Prices are provided as an estimate and are subject to change without prior notice.

Requesting
 Please select all that apply. If you do not see the item you need on any of the options below, please submit your request on the Non-Standard Technology Request form.

Standard Technology Options *

<input type="checkbox"/> Computers	<input type="checkbox"/> PC Accessories
<input type="checkbox"/> iPads & eReaders	<input type="checkbox"/> Mac Accessories
<input type="checkbox"/> Printers, Scanners, Faxes	<input type="checkbox"/> Monitors
<input type="checkbox"/> External Storage	<input type="checkbox"/> Batteries

Estimated Total
 This is an estimate and prices are subject to change without notice. If you need exact pricing for budgeting purposes, please contact Procurement Services at procure@umw.edu for assistance.

Estimated Total
\$0.00



File Organization

CONTRACT FOLDER ASSEMBLY AND FILING PROCEDURES

I. UMW Issued Term Contracts (IFBs, RFPs, RFQs, URFPs)	1
II. UMW Issued Term Contracts achieved through Quick Quotes (QQs)	2
III. UMW Issued Term Contracts achieved through Sole Source (multi-year SS)	3
IV. Term Contracts achieved through Cooperative use contracts (COOPs)	3
V. Spot Purchase Contracts achieved through Quick Quote or Reverse Auction	4
VI. Capital Outlay Contract Files for RFP, RFQ, IFB – (CPSM)	4
VII. No-Awarded Contracts	6
VII. Folder Tab Labels	6
VIII. Fiscal Year Filing Cabinet Organization	7
IX. Exhibits A-E	8-12

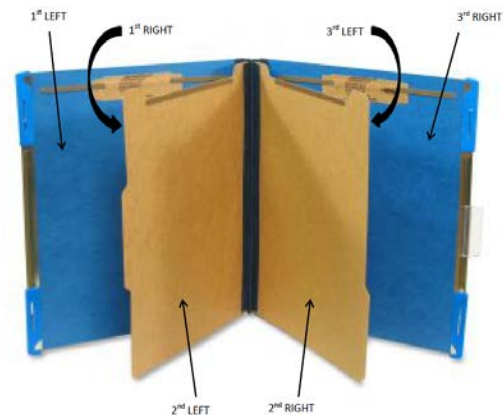
VIII. Folder Tab Labels

- A. UMW Issued Term Contracts (IFB, RFP, URFP, etc) w/ and w/o COOP
 - 1. Line 1: Cobblestone # - Contract Type
 - 2. Line 2: Good/Service Description
 - a. Examples:

UCPUMW 15-365 – RFP
Athletic Recruiting Mgmt System

UMW 15-96 – IFB
American Combustion Industries

Ex. A: Hanging Blue Folder w/ Tabs



Contract File Checklist

CONTRACT SUMMARY

CONTRACT #			
PROCUREMENT TITLE			
CONTRACT ADMINISTRATOR			
CONTRACTOR #1	Contr. Lic.#		
CONTRACTOR CONTACT NAME	DMBE CERT.#		
EMAIL	FEIN#		
PHONE	SCC#		
FAX			
ADDRESS 1:			
ADDRESS 2:			
CONTRACTOR #2	Contr. Lic.#		
CONTRACTOR CONTACT NAME	SCC#		
EMAIL	FEIN#		
PHONE	DMBE CERT.#		
FAX			
Address 1:			
Address 2:			
CONTRACTOR #3	Contr. Lic.#		
CONTRACTOR CONTACT NAME	DMBE CERT.#		
EMAIL	FEIN#		
PHONE	SCC#		
FAX			
Address 1:			
Address 2:			
TERM OF ORIG. AGENCY CONTRACT (DATES)	EST. CONTRACT VALUE \$ W/RENEWALS		
RENEWALS IF ANY (#/ #yr):	BUDGET FIGURE		
FINAL EXPIRATION DATE:	SPCC ACCEPTED IN EVA?		
ORIG. AGENCY CONTRACT OFFICER NAME	COBBLESTONE ACTIVE/PUBLIC		
VBO POSTING CONFIRMATION NOTICE	COPY OF ORIG. SOLICITATION		
ADDENDA VBO POST. CONF. NOTICE(S)	GENERAL Ts & Cs REFERENCED?		
eVA REGISTRATION SCREEN SHOT	ADDENDA IF ISSUED		
DMBE CERTIFICATION INFO	SUCCESSFUL QUOTES/BIDS/PROPOSALS		
LICENSE REQUIRED?	EXEC. CONTRACT w/NEG. ATTACH.		
INSURANCE CERTIF. RECEIVED?	MODIFICATIONS FOR UMW TO USE		
SIGNED CONTR. ADMIN ASSIGN/TRAIN	PURCHASE ORDER ISSUED		

NOTE: IF A CATEGORY IS NOT APPLICABLE, INDICATE "N/A" IN THE APPROPRIATE BOX.

PROCUREMENT OFFICER SIGNATURE: _____ DATE: _____
 FILE REVIEWED BY: _____ DATE: _____
 EXTERNAL FILE REVIEW: _____ DATE: _____
 DATE CLOSED OUT: _____ INITIALS: _____

CONTRACT SUMMARY

CONTRACT #			
PROCUREMENT TITLE			
CONTRACT ADMINISTRATOR			
CONTRACTOR #1	Contr. Lic.#		
CONTRACTOR CONTACT NAME	DMBE CERT.#		
EMAIL	FEIN#		
PHONE	SCC#		
FAX			
ADDRESS 1:			
ADDRESS 2:			
CONTRACTOR #2	Contr. Lic.#		
CONTRACTOR CONTACT NAME	SCC#		
EMAIL	FEIN#		
PHONE	DMBE CERT.#		
FAX			
Address 1:			
Address 2:			
CONTRACTOR #3	Contr. Lic.#		
CONTRACTOR CONTACT NAME	DMBE CERT.#		
EMAIL	FEIN#		
PHONE	SCC#		
FAX			
Address 1:			
Address 2:			
TERM OF INITIAL CONTRACT (DATES)	EST. CONTRACT VALUE \$ W/RENEWALS		
REMAINING RENEWALS IF ANY (#/ #yr):	BUDGET FIGURE		
FINAL EXPIRATION DATE:	SPCC ACCEPTED IN EVA?		
CONTRACT OFFICER NAME	COBBLESTONE UPDATED/ICA ATTACHED		
JUSTIFICATIONS RFP/NO CONF./SET-ASIDE	PROCUREMENT SURVEY SENT & RECD		
RELEASE REQ? VCE	POST AWARD MEETING/NOTES		
RFP EVAL COMM CONFLICT OF INT. FORMS	ISSUES/CORRESPONDENCE		
SIGNED CONTR. ADMIN ASSIGN/TRAIN	CURE NOTICE/DISPUTE RESOLUTION		
COPY OF SOLICITATION w/ GEN Ts&Cs REF	COMPLAINT TO STATE VENDOR FORM		
SUCCESSFUL QUOTES/BIDS/PROPOSALS	DEBARMENT NOTICE FROM DPS		
EXEC. CONTRACT w/NEG. ATTACH.	SITE VISIT/INSPECTION REPORTS		
ADDENDA/MODIFICATIONS IF ISSUED	SWAM PLAN?		
PO/CHANGE ORDER ISSUED	PREBID ATTENDEE ROSTER/NOTES		
FORMAL RFP : MEDIA ADVERTISING	TABULATION OF RESPONSES		
VBO POSTING CONFIRMATION NOTICE	SINGLE RESPONSE REASONABLE JUSTIF.		
ADDENDA VBO POST. CONF. NOTICE(S)	NEGOTIATION POINTS AND NOTES		
NOTICE OF INTENT OR AWARD	EVALUATIONS & SUMMARY		
eVA REGISTRATION SCREEN SHOT	REQUISITION/EMAIL REQUEST or REBID		
DMBE CERTIFICATION INFO	FUND		
REFERENCES CHECKED IF REQUESTED	ORGANIZATION		
CHECK DEBARMENT LIST (DATE)	ACCOUNT		
LICENSE REQUIRED/RECD	PROGRAM		
INSURANCE CERTIF REQD/ RECD	ACTIVITY		
BONDS IF REQUIRED	UNSUCCESSFUL BIDS/PROPOSALS		
ISA ON FILE IF REQ (HOSTED IT ONLY)	CONTRACT CLOSE OUT SURVEY		

NOTE: IF A CATEGORY IS NOT APPLICABLE, INDICATE "N/A" IN THE APPROPRIATE BOX.

PROCUREMENT OFFICER SIGNATURE: _____ DATE: _____
 FILE REVIEWED BY: _____ DATE: _____
 EXTERNAL FILE REVIEW: _____ DATE: _____
 DATE CLOSED OUT: _____ INITIALS: _____



Feedback, really?

Save Money Through Better Sourcing and Contract Management



Survey Instruments

The screenshot shows a web browser window displaying the University of Mary Washington Procurement Services website. The page title is "Procurement Services" and the sub-page is "Customer Survey". The survey is for a solicitation processed by the Procurement Services Department. The survey questions are:

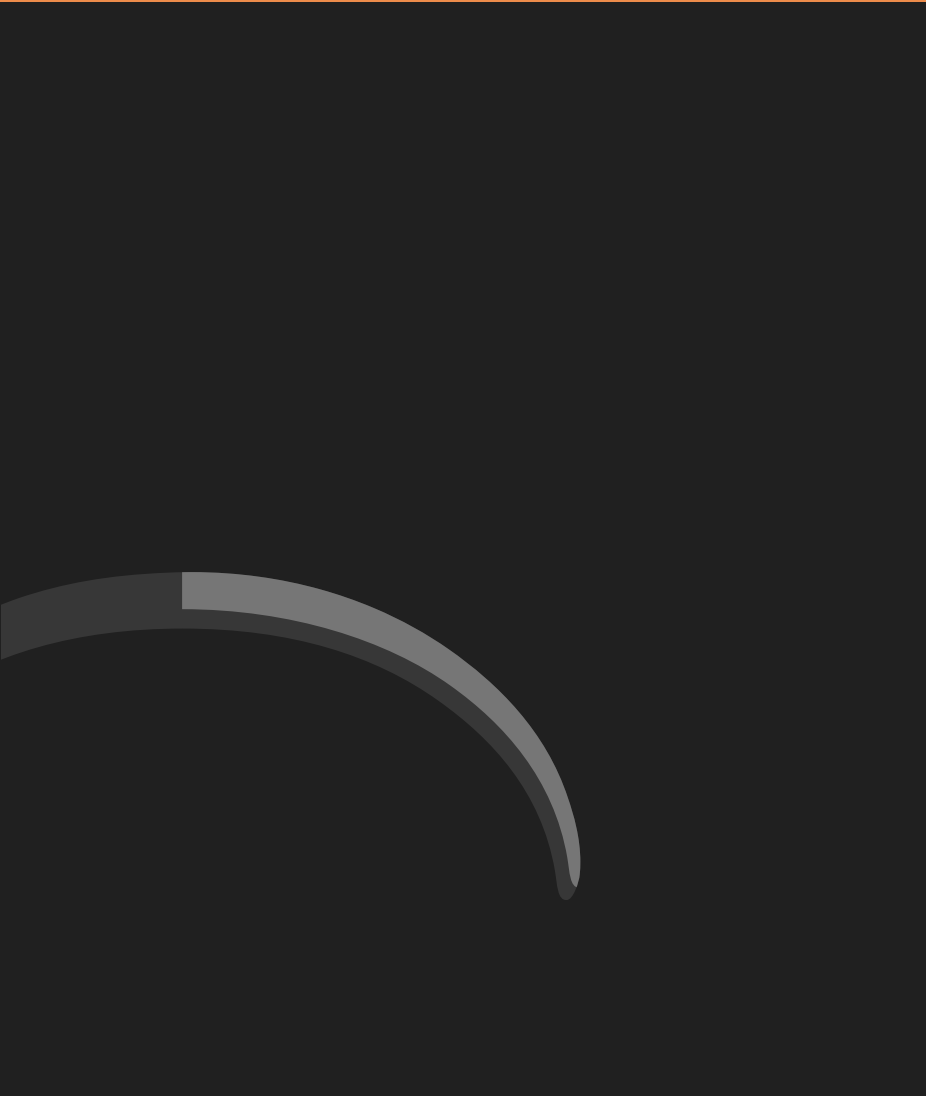
- Name:** Two text input fields for "First" and "Last".
- Extension:** One text input field.
- Email:** One text input field.
- Type of good or service solicited:** One text input field.
- Was your bid processed in a timely and efficient manner?** Radio buttons for "Yes" and "No".
- Was the cost in line with what you expected to pay for this item?** Radio buttons for "Yes" and "No".
- Was the bid accurate when it was issued to potential bidders?** Radio buttons for "Yes" and "No".

The left sidebar contains a navigation menu with items like "Central Storeroom/Surplus", "UMW Contract Portal", "Contracts", "Vendors", "Laws, Policies and Procedures", "Forms", "Training", "Small Purchase Credit Card", "Directions and Maps", "How Are We Doing?", "Frequently Asked Questions", and "Contact Us". There are also logos for "eVA Virginia's eProcurement Solution!" and "Works Bank of America - Small Purchase Credit Card". At the bottom left, there is a calendar for "October 2014" showing days M, T, W, T, F, S, S.

Survey Comments

- Shannon Finley was on top of the bid and subsequent contract, keeping us informed every step of the way.
- The bid was processed quickly, without any problems. Thank you for your help!
- Shannon was great to work with. She kept me informed at each step through the entire process
- Thanks so much to Shannon for all our work on this.
- Would like to mention that Melva was GREAT!
- From start to finish, the Purchasing Office was very helpful in solicitation of this bid and keeping our office informed throughout the process. Thank you!
- Shannon does an outstanding job, I enjoy working with her
- Melva was extremely helpful in executing this contract for us. Thank you Melva!
- Melva was a great help in keeping on track with this procurement contract and for keeping me informed.
- As always Melissa was very helpful, professional and efficient in assisting with our needs!
- Melissa was instrumental in securing this contract. She was helpful and very professional
- Excellent Job as always.
- This was a great process! Thank you!
- Everything went quickly and we were able to get the equipment before graduation.
- Michelle did an excellent job with this procurement. I had several conversations with her about the best way to proceed, and she was helpful and professional throughout the process. Thanks very much Michelle!





FORUM2014

Contract Management System

UNIVERSITY OF MARY WASHINGTON
where great minds get to work

1301 College Ave, Fredericksburg, Virginia 22401

Help

University of Mary Washington - Contract Management System Public Website Search

Search By:

Contractor
-- Select One or Begin Typing --

Contract Title
Brick Mason Services

Contract Number (#)
-- Select One or Begin Typing --

Contract Officer
-- Select One or Begin Typing --

UMW Reference or Other Agency COOP
-- Select One or Begin Typing --

Contract Administrator
-- Select One or Begin Typing --

Search Records

Powered By: CobbleStone Systems Corp. - All Rights Reserved

Privacy Statement

UNIVERSITY OF MARY WASHINGTON
where great minds get to work

1301 College Ave, Fredericksburg, Virginia 22401

New Search Help

University of Mary Washington - Contract Management System Public Website Search

View	Contract Title	Contractor	Contract Number (#)	Contract Officer	Contract Admin	SWAM	Current Term End
view	Brick Mason Services	Lupton Masonry	UMW 10-41	Myers, Melissa mmyers@umw.edu	Wilson, Joni	N/A	5/31/2015

New Search

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UNIVERSITY OF MARY WASHINGTON
where great minds get to work

1301 College Ave, Fredericksburg, Virginia 22401

Help

University of Mary Washington - Contract Management System Public Website Search

Contract Title:	Brick Mason Services
Contractor:	Lupton Masonry 1800 Fall Hill Avenue Fredericksburg, VA 22401
Contract Number (#):	UMW 10-41
UMW Reference or Other Agency COOP:	IFB 10-27
UMW Reference or Other Agency COOP URL:	N/A
Vendor Contact:	Claude Lupton 540-373-6409
Contract Officer:	Myers, Melissa mmyers@umw.edu
Contract Administrator:	Wilson, Joni
SWAM:	N/A
Current Term End:	5/31/2015
Renewals Remaining:	1, one year
Final Expiration:	5/31/2016

Listed below are public documents related to this contract. For further information regarding this contract, please contact the UMW Contract Officer at the email address above.

Attachments / Files

View File

[FOIA IFB 10-27 Contract #1.pdf](#)

[IFB 10-27 Modification # 3.pdf](#)

[IFB 10-27 Modification #1.pdf](#)

[IFB 10-27 Modification #2.pdf](#)

Contract Administration

Contract Administration: The Basics



UNIVERSITY OF
MARY WASHINGTON

where great minds get to work



FORUM 2014

Contract Administrator Role

Contract Administrator Designation

Contract Administrator Annual Training and Quiz

Contracts available through the CMS

Limitations on Actions

**CA assignments on limited state contracts that are considered high profile or high risk*

ex. Mythics for Oracle support or AISN hosting campus website



Analytics

SWaM

- Letter from VP
- SBDC partnership
- Subcontracting Reporting Workflow
- Outreach

Annual Report

- Assessment measures
- Multi-year comparisons
- Significant events
- Value

Savings



SWaM Initiative

Greetings:

The quality of service the University of Mary Washington is able to deliver to its customers is directly related to the excellent support we receive from you and many other outstanding suppliers of goods and services. Without you, we would not be able to fulfill our educational mission. An important part of our procurement program involves our commitment to doing business with small, women-owned and minority-owned (SWaM) businesses. We look to you to help us achieve this objective.

We conduct substantial business with small firms and have a particular institutional focus on developing long-term business relationships with women-owned and minority-owned businesses. We count on our majority firms to help us achieve our goal.

I seek your assistance in two areas. First, I ask that you involve small, women-owned and minority-owned businesses in the delivery of goods/services you provide to UMW. The Procurement Services office is able to assist you in identifying qualified diverse business partners. Second, I seek your help in reporting your results through monthly/quarterly subcontracting reports. The terms and conditions previously provided to your organization outlined this process.

As a state agency, this effort is important to us. This is another way that UMW can partner with your company to make things better.

A SWaM reporting template is located on our Procurement Services website at <http://adminfinance.umw.edu/procurement/vendors-2/swam-reporting>.

Sincerely,



Richard R. Pearce
Vice President for Administration and Finance and CFO



SBDC Fast Track

The screenshot shows the Virginia SBDC website interface. At the top, there is a navigation bar with icons for EagleNet, Banner, Canvas, Email, Library, EagleOne, eVA, EagleEye, Passwords, Directory, Starfish, and Helpful Links. Below this is the University of Mary Washington header with a search bar and navigation links for UMW, This Site, and People. The main content area features the Virginia SBDC logo and the tagline "Your Business Resource for Consulting, Training and Research". A secondary navigation bar includes links for Home, About Us, Consulting, Training and Seminars, Programs, Research, and Assessments. The page content is divided into a left sidebar and a main content area. The sidebar contains contact information for the University of Mary Washington, office locations (Fredericksburg and Warsaw), and a calendar for October 2014. The main content area features the "SBDC Fast Track" heading, a description of the program, a list of program benefits, and contact information for Heather Wheeler. At the bottom, there are logos for the U.S. Small Business Administration (SBA), George Mason University Mason Enterprise Center, and the Virginia SBDC.

University of Mary Washington
 1125 Jefferson Davis Highway
 Fredericksburg, VA 22401
 (540) 654-1096

Office Locations
 UMWSBDC – Fredericksburg Office
 UMWSBDC – Warsaw Office

UMW SBDC Events

October 2014						
M	T	W	T	F	S	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Request for Consulting – Fredericksburg
 Request for

SBDC Fast Track

You are here: Home / Programs / Government Contracting Assistance Center / SBDC Fast Track

UMW offers a Fast Track program for current and upcoming businesses. The program can help your business become SWaM certified, provide helpful business resources and much more. You will have an opportunity to meet with consultants to help get your business going, or help your business grow if you are already established.

The Fast Track program:

- is designed to get you in and out within two weeks.
- can assist in becoming registered with the Department of Small Business and Supplier Diversity and eVA.
- provides training.
- provides industrial and demographic research.
- provides confidential one-on-one consulting with a focus on capital access and management planning.

For more information, or to meet with UMW's Small Business Development Center, please contact Heather Wheeler: hwheeler@umw.edu, (540) 654-1096.

U.S. Small Business Administration **SBA** Your Small Business Resource
 GEORGE MASON UNIVERSITY Mason Enterprise Center
 VIRGINIA SBDC

SWaM Subcontracting

13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

SWaM Subcontractor Reporting

This form should be used by vendors to report their Small, Woman-owned and Minority-owned (SWaM) business spend.

Vendor *

Please enter the name of the COMPANY

Contract Number

Please enter the CONTRACT NUMBER

Name *

First

Last

Please enter the SUBMITTER'S first and last name

Email *

Please enter the SUBMITTER'S email address

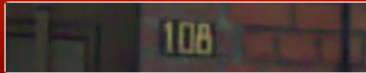
Select Reporting Method *

- Upload Spreadsheet/Document
- Manual Input


Additional Comments/Information

Please provide any relevant comments or information

Captcha



Type the text

[Privacy & Terms](#) 



How to Do Business



2013 SWaM Pacesetter Award

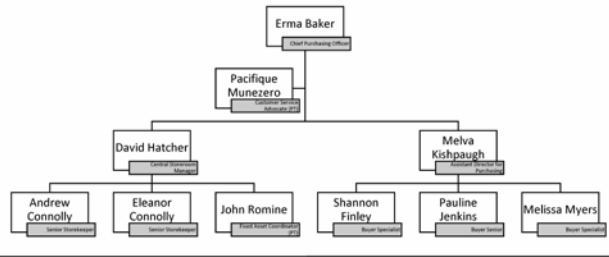


Annual Reporting

UNW PROCUREMENT SERVICES

The Procurement Services department assists members of the University of Mary Washington community with the procurement of all goods and services along with surplus items, guidelines, and procedures.

Procurement Services Organizational Chart
As of July 1, 2013



Purchasing FY14

New and Noteworthy

Achievements

- Completion of the name change to Procurement Services
 - Award of Tier II operating authority, and conversion to new status, including:
 - website/forms sanitized to reflect appropriate legal references related to governing laws and procedures
 - Revised General Terms and Conditions
 - Revised Special Terms and Conditions
 - Development of Small Purchase Procedures
 - Staff familiarization and training on new law and regulations
 - Managed contract renewals to convert to new terms and conditions and legal references
 - Revised cooperative clause, which we will use in most (if not all) IFB/RFP solicitations
 - Adoption of National Association of Educational Procurement Code of Ethics
 - Conversion to Electronic Procurement "EP" purchase orders, an early adopter based upon involvement in DPS pilot program. (The EP protocol has yet to reach full capacity).
 - Student Intern outcome: cohesive presentation of SWAM initiatives and assimilation of data on the Procurement website
 - NO vendor complaints or protests
- SWAM targets completed to date:
 - Improve web presence of Supplier Diversity efforts and access to information
 - Provide vendors with a template for quarterly submission of subcontracting reports
 - Create a user friendly electronic submission process for non-capital subcontract activity reports
 - UMW Procurement Services received the Supplier Diversity Pacesetter award during Commonwealth of Virginia Procurement Forum
 - Acquired a contract management system. Spring Semester included training and data migration in preparation for an FY15 roll-out.
 - Initiated a Client Relations Management (CRM) approach to departmental relations with campus departments. See testimonial received below reflective of this service method*.

Outreach:

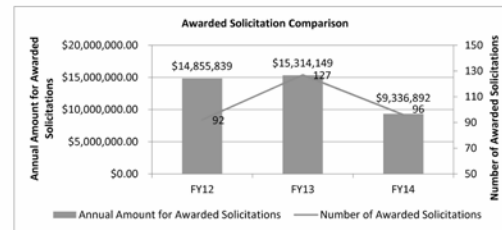
- 1:1 Meetings with various campus departments
- Supplier Diversity event at UVA 6/10/14
- Promote on-site UMW SBDC eVa Vendor Training
- Hosted visit from peer institution them with ideas to improve their operation.
- Continue to build collaboration with Small Business Development Center to seek out and certify qualified businesses

Challenges:

Staff turnover. During the final 6 months of the fiscal year, 4 members of the procurement staff resigned. Two individuals have assumed procurement positions offering expanded opportunities within the state, and the third accepted an option position at UMW, and the fourth to become a full-time UMW student. FY15 will begin with refilling vacant positions and training new staff.

Purchasing Activity Summary

Solicitation Type	Number of Solicitations			Annual Award Amount		
	FY12	FY13	FY14	FY12	FY13	FY14
Agency Procurement Request (APR)	4	2	0	\$1,630,000	\$991,000	\$0
Consultation	0	3	3	\$0	\$74,000	\$22,500
Cooperative Contract (COOP)	0	6	8	\$0	\$113,000	\$369,737
Emergency Procurement (ER)	0	6	2	\$0	\$120,743	\$15,500
General Services Administration	0	0	1	\$0	\$0	\$290,758
Invitation for Bid (IFB)	12	12	6	\$1,088,971	\$727,680	\$1,264,351
Quick Quote (QQ)	39	24	19	\$496,952	\$276,540	\$194,281
Reverse Auction (RA)	0	7	9	\$0	\$51,464	\$95,001
Request for Proposal (RFP)	4	7	7	\$10,751,156	\$11,625,400	\$6,320,735
Sole Source (SS)	33	52	40	\$888,760	\$1,115,029	\$709,030
Unsealed Request for Proposal (URFP)	0	8	1	\$0	\$219,293	\$55,000
TOTAL	92	127	96	\$14,855,839	\$15,314,149	\$9,336,892



Value Add

Procurement as a Value Add Operation

CRM Approach

Opportunity Seeking

Methods (Reverse Auction)

Cooperative Contracts

Communication

Real Value?

Make it Easy For Everybody!



CRM Approach

Erma,

My team, working on a Commencement (procurement), had a meeting this morning with Shannon. I wanted to pass on to you how professional and helpful she is every time we meet for planning or have questions. Since procurement is not something we do every day she is wonderful at keeping us on track and makes purchasing so much easier for us. Our mission truly is to follow the state procurement policies and in general be a good client to purchasing.

Just wanted you to know that Shannon is an excellent representative of your department.

Susan.

CRM Guidelines

Gather Information:

- Check eVA for department's most commonly purchased items
- Check SPCC expenditures for patterns and to identify contract opportunities
- Make a list of current contracts the department has or that they may access.

Meet with Department

- Discuss objectives: Discuss the Procurement Services Plan and what we are trying to accomplish
- Understand department's specific needs
- Find out if the department has any concerns
- Determine meeting schedule: are quarterly meetings needed or semiannual meetings etc.

Follow up with a summary of the meeting and outline topics discussed.

- Assign items that require follow up or action to specific people
- Give timeline as to when items may be completed-Remember under promise and over deliver!

Follow through

- Complete action items as discussed
- Touch base with department to see if anything else is needed before next meeting.



Opportunity Seeking

Nursery Items, plants, supplies	\$28,319.20	UVA multiple "contracts"??	Roxbury, others (Grounds semi-annual floral purchases)
Lab Supplies off state contract	\$28,014.39	VASCUPP contracts - VT, others	Carolina Bio., Beckman Coulter, Agilent, Amer. Type. Cult.,
Auto Parts	\$24,854.38		Lane Auto Parts, Auto Plus, Pitts Automotive, FXBG Auto Salvage
Fitness equip & supplies	\$23,799.23	Use BSN/Nike Contract	Greener Concepts, Rappahannock Sport & Graphics
Locksmith	\$20,684.99	*may include emergency purchases	Professional Lock & Key
Plumbing/MRO Supplies	\$19,640.61		N.D. Associates
Hardware/MRO OTC	\$70,548.09	VT contract w/84 Lumber -- use solicitation?	Earl's Hardware, Home Depot, Lowe's
Photo/Video Equipment	\$16,180.17	VASCUPP/VITA	B&H Photo Video, Full Compass, Barbizon
Stone	\$13,165.37	UVA contract???	Luck, Walker Sand & Stone
Janitorial Supplies-Mildew cleaner, etc.	\$13,020.00	add to Abel Contract	Chadwicks
Equipment Rentals	\$11,591.16	MM/IFB	



Share Results

Reverse Auction Results

“The Purchasing Department made the reverse auction process easy for us to understand and benefit from! All we had to do is provide them with a list of the items we were looking to purchase and using this system, they saved my Department over \$2500.”

Recap of RA activity in FY13

TYPE	SOL. #	ISSUE DATE	COMMODITY	EST. ANNUAL VALUE	ACTUAL ANNUAL AWARD	SAVINGS
RA	189083	10/2/2012	UPS Battery	\$6,900.00	\$6,299.00	\$601.00
RA	189393	10/17/2012	Speakers	\$11,412.20	\$9,402.00	\$2,010.20
RA	190596	12/18/2012	Swimwear	\$9,530.00	\$9,520.00	\$10.00
RA	190839	1/8/2013	Fitness Equipment	\$8,700.00	\$8,049.00	\$651.00
RA	191258	1/30/2013	Konica Digital Film Scanner	\$9,200.00	\$7,887.00	\$1,313.00
RA	191264	1/30/2013	Resonant Phase Modulator	\$5,112.14	\$5,112.14	\$0.00
RA	191697	2/19/2013	Scannx Book ScanCenter	\$6,000.00	\$5,195.00	\$805.00
			TOTALS	\$56,854.34	\$51,464.14	\$5,390.20



Cooperative Contract Options

VASCUPP VIRGINIA ASSOCIATION OF STATE COLLEGE & UNIVERSITY PURCHASING PROFESSIONALS

Welcome to the VASCUPP website.
Sunday, November 2, 2014

Virginia Commonwealth University

ABOUT VASCUPP **ASSOCIATE MEMBERS** **MEMBERS** **COOP CONTRACTS** **SUPPLIER DIVERSITY** **RELATED LINKS**

HOME BY-LAWS BOARD OF DIRECTORS
HIGHER ED MANUAL GOVERNING RULES

VASCUPP CONTRACT DATABASE

Institution:

Contractor:

Last Updated: / /
 Before After

Category:

Contract Number:

SWAM Class:

SWAM Usage:

Contract Title:

Buyer First:

eVA:

Contract Type:

Buyer Last:

Expired: No

Search Reset Display All

Communications (eUpdate)

October 2014 Updates and Announcements

Procurement Services

- Congrats Melva, CUPO Certification!
- Procurement Documented Savings
- Contract Activity
- Department SWaM, top 10 list!
- Late Invoices on SPCC/Gold Card REQUIRE DOA Approval
- Office Furniture Savings Opportunity
- Bulb Crusher

Bookstore

- Faculty Adoption Deadlines for Spring Semester
- November Super Savings Event - **11.17.14**

Copy Center

- Network Printing Stats/Savings
- Additional Services

EagleOne

- 3 iValidate iPads and readers available
- Exclusive Beverage contributions

Parking

- Campus Space changes
- Construction_impact on parking

Post Office

- Upcoming Department Mail Jobs Consultation

CUPO Certification

- Congratulations to Melva Kishpaugh on receipt of Certified University Purchasing Officer (CUPO) designation, this certification demonstrates knowledge of the VASCUPP Governing Rules, and Higher Educational Procurement Manual.

Procurement Documented Savings for FY15, 1st Quarter

\$131,520

Contract Activity

- RFP - Institutional Outcomes Assessment and Accreditation, evaluation in progress
- URFP - Ticketing System, evaluation in progress
- RFP - Behavioral Incident and Conduct Management Software, contract in progress
- RFP - Horseback Riding Services, evaluation in progress
- RFP - Hotel Services, Preferred Provider, evaluation in progress
- IFB - Rugby Field Upgrade, issued
- RFP - Jepson Renovation/Addition, issued



Communication

eUpdate excerpt:

Top 10 Department SWaM (July 2014-September 2014)

Want to check your department's SWaM spend?

Follow these easy steps: [eVA Department SWaM Spend Guide](#)

Department	% SWaM Spend
Administration and Finance	100%
Dean of Instruction	100%
Nursing	100%
Finance	95%
English, Linguistics and Communication	89%
Modern and Foreign Languages	85%
Multicultural Center	84%
University Events	78%
President	77%
Residence Life	76%

Within Orientation Recap

Procurement Services:

4 individuals contributed 20 volunteer hours

Assistance w/the pillow purchases & VIB

Established Contracts that impact event:

- Convergent contract – Alarm issues at Randolph
- Sodexo/Food Services Contract
- Allied – Waste Management
- AlliedBarton – Security
- Rappahannock Goodwill Industries (linen rentals)
- GCA – janitorial services
- Minters – Golf carts
- Printing contracts
- Abel – cleaning supplies for UMW housekeeping



Our time to shine !

Erma Baker

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