

# Strategic Procurement Plan

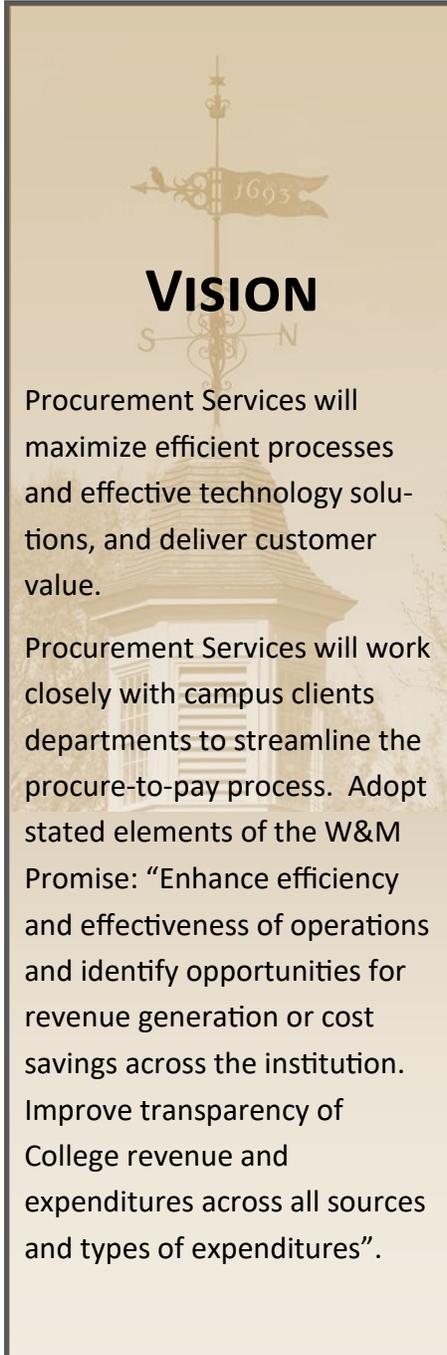
Fiscal Year 2018—2022



## MISSION

The mission of Procurement Services is to support W&M as a leader among liberal arts universities through delivery of procurement excellence.

We will establish: strategic thinking in procurement efforts, responsible stewardship of university resources, customer-focused services, innovation among ourselves and our suppliers, inclusive excellence from a diverse supplier base, streamlining of business processes while maintaining University compliance, with attention to corporate social responsibility both within the institution and among its Suppliers.



## VISION

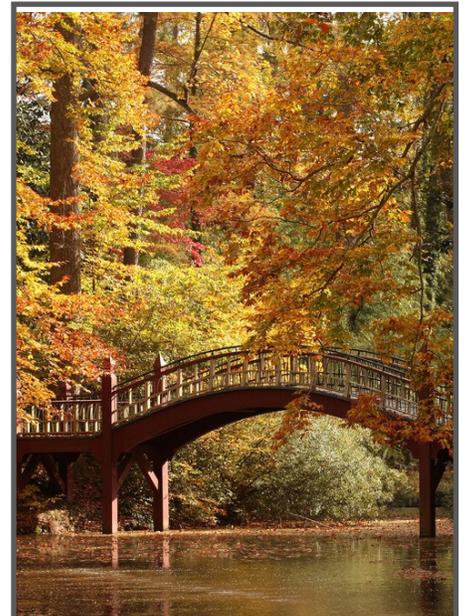
Procurement Services will maximize efficient processes and effective technology solutions, and deliver customer value.

Procurement Services will work closely with campus clients departments to streamline the procure-to-pay process. Adopt stated elements of the W&M Promise: “Enhance efficiency and effectiveness of operations and identify opportunities for revenue generation or cost savings across the institution. Improve transparency of College revenue and expenditures across all sources and types of expenditures”.



## VALUE

Strive to be an ethical role model for the campus and peer institutions by demonstrating core values that are essential for building a highly reputable procurement operation.





WILLIAM & MARY  
CHARTERED 1693

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Fiscal Year 2018 – 2022

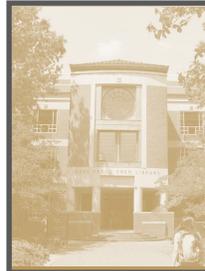
## Procurement Priorities

*Value—Service—Quality*



### **CUSTOMER-CENTRIC FOCUS**

Partner with stakeholders to anticipate and meet client needs. Be a trusted advisor for the campus community.



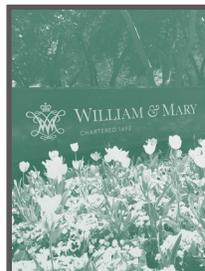
### **DYNAMIC TECHNOLOGY SOLUTIONS**

Adopt technology solutions that streamline procurement activity, support compliance, reduce lead time and improve information results.



### **TALENT DEVELOPMENT**

To recruit, engage, and retain skilled and motivated professionals capable of delivering value-added procurement.



### **TRANSPARENT PROCESSES**

Establish clear direction and oversight of decentralized procurement activities and performance under established thresholds.



### **VALUE, INNOVATION, AND INCLUSIVE EXCELLENCE**

Provide best value contracts that deliver savings, introduce innovation, and support the campus community.



### **DATA DRIVEN, SOLUTIONS FOCUSED**

Deliver timely, reliable information to the campus, frame historical data, project trends in partnership with campus clients, and forecast market changes.



Greetings College Community:

On behalf of Procurement Services, it is our pleasure to present this Five-Year Strategic Plan. The next five years will be transformational in the life of the College of William & Mary. In 2018 the university will recognize the 325<sup>th</sup> anniversary of the Institution and the retirement of our beloved 27<sup>th</sup> President, Taylor Reveley. Together we will celebrate the 50<sup>th</sup> anniversary of our first African American residential students, and welcome the 28<sup>th</sup> President of this esteemed College. Doors will open on a new Campus Wellness Center, a new Performing Arts Building, growth of William & Mary's Virginia Institute of Marine Science campus, and many other exciting projects.

Despite the bright prospects for W&M, higher education in general continues to face external pressures of diminishing resources and increasing costs. Through innovation and best-in-class procurement practices, we will strive to deliver a competitive advantage to the university. Procurement Services will seek return on investment beyond simple cost efficiencies and deliver both financial value (cost savings realized by increasing spend under contract), and strategic value (improved transparency and awareness of expenses and enhanced relationships with key Suppliers). We must drive value, deliver quality, promote our services, and align with the university's strategic plan.

As we move from planning to implementation, we look forward to positively influencing outcomes, supporting faculty, staff, students, alumni, business partners and community members, and advancing the principles of VALUE, SERVICE, and QUALITY.

Sincerely,

Erma A. Baker

Director of Procurement Services





## Client Centric Procurement Support

Be a trusted advisor for the campus community while maintaining policy compliance through consistent service, ongoing training, and by providing campus clients with the tools needed to manage procurements within their level of decentralized authority.

Partner with stakeholders to anticipate and meet client needs.

Encourage efficient procure to pay solution for Suppliers and internal stakeholders, serve as a resource for campus.

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### Procurement Services will:

Engage campus clients in the supply chain planning of goods and services and maximize procure to pay solutions.

Deliver goods and services that meet the needs of campus clients and add value to the University.

Partner with peer departments (such as Financial Operations or HR) to deliver a consistent message to the campus community.

Communicate with campus in meaningful ways (website, newsletters, Digest posts, focus group meetings etc.) to best target audiences.

Deliver relevant departmental training, consider optional/multiple modes of delivery, consider “on-demand” access to training.

Identify patterns of non-compliance among campus clients and target communications and training to mitigate future risk of recurrence.

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### In FY2020, our success will be measured by:

Facilitate at least two “open labs” to offer hands-on training on procurement topics for W&M and VIMS with a goal of enhancing client experience.

Establish a Procurement Advisory Council comprised of strategic campus stakeholders to enhance client engagement, review campus needs and partner on proposed changes.

Customer satisfaction surveys, goal: achieve 80% or better satisfaction ratings.

Review waiver protocol for speed, value and efficiency, improve outcomes.

Acknowledge campus clients who deliver quantifiable value to campus through high quality work. Communicate those success stories to campus.

Host a campus-wide open forum procure-to-pay training/education event each semester to enhance client engagement discuss business processes, client needs, systems, common interests, solicit user feedback and facilitate positive two-way communication.

Conduct a Spring 2020 client survey on campus satisfaction. Measure procurement performance; compare progress over time (with FY18 and FY19 results).

Using FY18 as baseline for findings of non-compliance, evaluate data, identify risk areas, target reduction in incidents through training and education.

Active engagement in the externship program with W&M Law School.





## Talent Development

To recruit, engage, and retain skilled and motivated professionals capable of delivering value added procurement.

Support staff development, advancement, and succession planning.

Promote work/life balance.

Offer competitive salaries and personal benefits, as funding levels permit.

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## Procurement Services will:

Review all departmental position descriptions and update roles to reflect strategic priorities.

Within the performance planning cycle, incorporate meaningful and actionable goals that will deliver results to the institution and strengthen talents of individuals

Support individual staff training plans, and encourage use of on-site tools.

Support professional development opportunities as staff coverage and funding permit.

Provide relevant professional membership opportunities that develop skills and provide benefit to W&M.

Expand sources used to gather business intelligence and prepare for solicitations and negotiation (NAEP, NIGP, IbisWorld, Hoovers, etc.).

Support staff expansion of skill sets that complement procurement functions.

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## In FY2020, our success will be measured by:

Roll-out “on demand” training to campus, supporting 24/7 access to training materials.

Update departmental project plan and leverage knowledge, skills and abilities of the team.

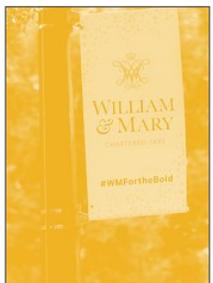
Afford each team member a project to foster continuous improvement.

Staff will maintain current certification levels and seek appropriate avenues to expand credentials/ specialties, staff will participate in a targeted number of hours of training (outlined in project plan). Including online training/webinars and no-cost options.

Engage in team building exercises at least once per quarter.

Procurement team members formally adopt and apply the NAEP Code of Ethics, and W&M Code of Ethics, each document will be reviewed annually.

Engage in cross-team activity/sharing at least once each semester.



## Value, Innovation and Inclusive Excellence



Provide best value contracts that deliver savings, introduce innovation, and support the campus community.

Consider opportunity to demonstrate corporate social responsibility through our actions and our contract partners.

Encourage Supplier Diversity through utilization of small, woman, minority, and/or disabled veteran owned businesses.

Innovate processes to meet demand of campus clients.

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### Procurement Services will:

Identify, capture, and manage savings by applying strategic procurement principles, sound contracting practices, client relations, and supplier relations management.

Encourage cooperative sources (VASCUPP, E&I, GPO, etc.) to establish new contracts and reduce administrative costs.

Maintain a focus on sound environmental and socially responsible practices and outcomes.

Encourage opportunity-seeking for greater innovation within contracts during negotiations at the time of renewal/modification.

Focus on process improvement; make things easier for campus clients.

Support active participation in Virginia Higher Education Procurement Consortium, "VHEPC".

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### In FY2020, our success will be measured by:

Re-establish strategic suppliers/contracts. Measure, monitor, and communicate those targets and value-add outcomes to audiences and stakeholders through client outreach, Digest, newsletter, email.

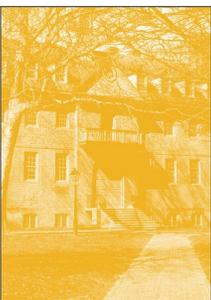
Conduct at least 4 training sessions for external Suppliers.

Achieve no less than 37% of SWaM/disabled veteran owned (42% aspirational) spend goal for discretionary purchases.

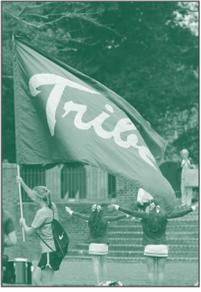
Track and achieve sustainability plan goals as set forth in the campus sustainability plan.

Host one supplier event to promote campus engagement with diverse supplier base.

Explore opportunities to expand and automate SWaM second tier capture and reporting .



## Promote Transparent Processes



Establish clear and accessible policies and procedures.

Communicate decentralized thresholds.

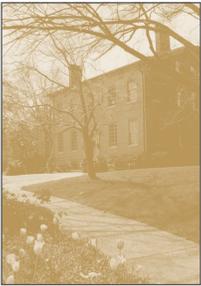
Participate in creation of a training curriculum for employees with fiscal responsibility.

Improve transparency of University revenue and expenditures across all sources and types of expenditures.

Endorse open, fair, and ethical business processes.

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## Procurement Services will:



Provide clear communication of and access to contracts for the campus community (W&M and cooperative contracts).

Establish Dashboard to monitor and measure key performance indicators in line with strategic objectives.

Improve transparency of spending data by sharing spend information with cross-functional segments of campus.

Develop procurement strategies in consultation with campus leaders.

Execute business process review to improve consistency and standardization of processes.

Improve access to training "on demand," 24/7.

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## In FY2020, our success will be measured by:

Measure contract activity monthly by method of procurement and contract type (W&M, cooperative, GPO), and total spend under contract.

Communicate to internal clients the availability of newly established enterprise-wide contracts which will be published in the contract management system timely.

Introduce VHEPC initiatives during CRM meetings/trainings, share related information with entire campus at least once per semester.

Monitor, maintain, and enhance the procure to pay matrix.

Continuation of standardization efforts for key processes to facilitate consistent results for campus clients, through a Business Process Review.

Explore the concept and potential curriculum for a campus certification program (for decentralized procurement /finance staff). Certified University Procurement Association "CUPA".

Sourcing team will conduct a minimum of four CRM meetings per year with key stakeholders. The focus will be needs assessment, forecasting, and sharing spend analytics/data as it becomes available.



## Dynamic Technology Solutions



Adopt technology solutions that simplify procurement activity to support compliance, reduce lead time, and improve information and results.

Provide resources to campus in a highly efficient manner.

Create an environment where technology is shared.

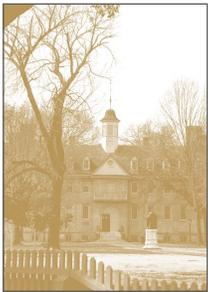
Enhance Supplier relationships.

Expand electronic forms/applications and improve electronic workflow to improve efficiency.

Implement technology solutions to assist with compliance.

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## Procurement Services will:



Maximize the use of and support for electronic procurement throughout the life cycle of a transaction: from development of specifications through contract administration and close out.

Deliver an enhanced procurement training solution for internal clients.

Be a pioneer for relevant W&M technology solutions: Panopto, Zoom, Cobblestone, Qlik.

Create and communicate procure to pay tools to campus clients.

Establish satisfaction surveys for users post-training to measure effectiveness and opportunity for improvement.

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## In FY2020, our success will be measured by:

Continued exploration of dynamic source-to-settle software solution to improve client experience and improve campus process efficiency.

Maintain "forms" webpage for procurement on central finance forms page. Encourage same for other divisions.

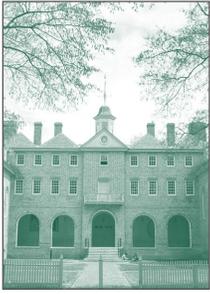
Maximize functionality of contract management system through workflows and automated features. Establish goal for 80% of W&M specific contracts to begin renewal/re-solicitation action 180 days prior to end of term.

Explore completion of fully electronic solicitation submittal via eVA.

Manage signature authority access and user profiles through technology with transparency.

Maximize eVA functionality where possible, including greater visibility of data, or streamlining processes.





## Data Driven, Solutions Focused

Utilize data to understand, predict, and improve business.

Share data among relevant stakeholders and across institutional boundaries to facilitate informed decision-making.

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### Procurement Services will:

Partner with IT Department to gain access to data.

Encourage collaboration between strategic sourcing/analytics specialties and procurement category specialists to share data and use data to drive improved outcomes.

Analyze data to track expenditures on a timely basis.

Determine baselines on relevant data and perform analysis on prospective options (using Situation, Background, Analysis, Recommendation “SBAR” model for business case.

When tool is available, leverage the use of Qlik to enable self-serve reports for users and communicate availability.

Collaborate with and provide feedback to contract vendors to improve business processes and enhance supplier relationships.

Expand the use of College Enterprise Resource Management “ERP” system to capture and store procurement data.

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### In FY2020, our success will be measured by:

Expand access to and aggregate data elements from different systems.

Focus on improved reporting: reconcile needs within monthly dashboard, quarterly spend by vendor and major category.

Transition catering solution to new owner, share purchase data with appropriate offices, improve compliance among purchasers and suppliers.

Collaborate with budget department for proactive communication of ETF allocations.

Contingent on IT project completion, collaborate w/IT to expand system generated reports through Qlik.

Monitor new Independent Contractor/Employee Classification process. Monitor outcomes to evaluate of proper classification of employee vs. IC.

