



# Campus Procurement Forum

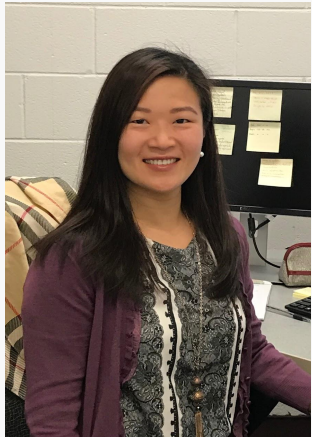
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October 2018

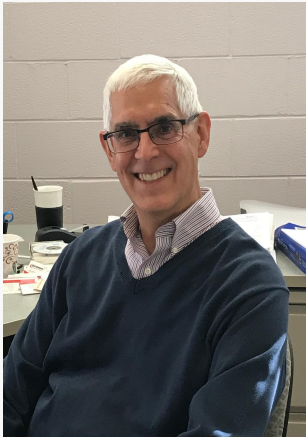
# Agenda

- ❖ Introductions
- ❖ Procurement Services Transformation
  - Mission, Goals, and Objectives
  - eProcurement Implementation
  - Other Procurement Related News and Initiatives
- ❖ Banner 9 Requisitions Demo
- ❖ Q&A

# Introductions: Your Procurement Services Team



***Snow Rutkowske***  
Director,  
Procurement  
Services



***Frank FioRito***  
Procurement  
Specialist



***Mike Wheaton***  
Procurement Card  
Administrator



***Donna Taylor***  
Accounts Payable  
Coordinator



***Elena Mancari***  
Accounts Payable  
Coordinator



***Luzmarie Arellano***  
Accounts Payable  
Coordinator

# Procurement Transformation

As part of the broader **Strategic Improvement Initiative (SII)**, Procurement Services is tasked with:

- ❖ the **modernization** of procurement related technologies and processes,
- ❖ the transformation into an organization that **collaborates with campus**,
- ❖ **creating added value** through **university-wide strategic contracting** and spend management

## Key Focus

Current State
Transactional Tasks
Manual/Paper-Based Processes
Decentralized Decision Making
Limited Analysis
Focus on Quotes/Bids
Reactive



Target Future State
Strategic/Value-Add Activities
Automated/Electronic Processes
Center-led Decision Making
Comprehensive Analysis
Category Mgmt. and Best Value
Proactive

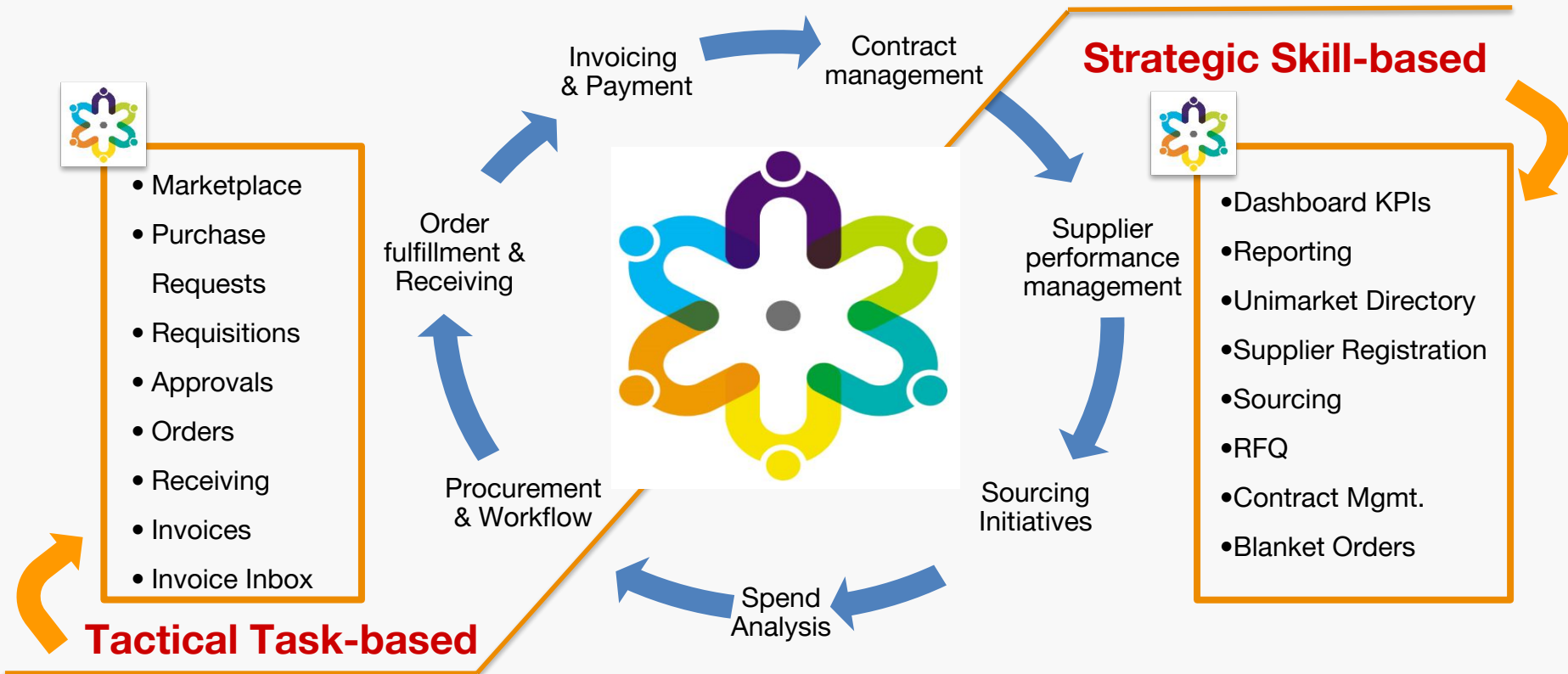
# New Procurement Services Mission Statement

*“The mission of Procurement Services is to support the purpose and strategic vision of Illinois Tech through all procurement related efforts, including, responsible stewardship of university resources, customer-oriented services, collaborative partnerships with campus, and efficient, effective, and compliant processes, to ensure the strategic and sustainable procurement of goods and services in accordance with Federal, State, and University laws and regulations to minimize risk and maximize value for all stakeholders.”*

# Introducing Unimarket

*Cloud-based and easy-to-use SaaS application*

*All procurement related activities can be handled in one place*



# Implementation Goals and Objectives

- ❖ **Improve operating efficiency** — reduce paper and manual processing within the Procure-to-Pay cycle
- ❖ **Improve user experience** — better User Interface, streamline processes
- ❖ **Provide a center-led strategy** — standardized Procure-to-Pay activities
- ❖ **Reduce risk and create greater control and visibility** — through an automated approval and compliance process
- ❖ **Obtain cost savings** — leverage and drive spending to university negotiated contract vendors in eMarketplace
- ❖ **Leverage electronic invoice and payments methods** — negotiate mutually beneficial payment method with suppliers

# Anticipated Timeline

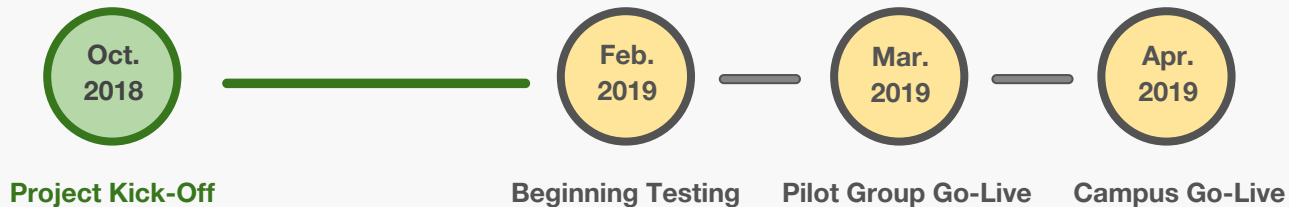


## Preliminary eProcurement Implementation Timeline

(Procurement, Vendor Registration, Supplier Marketplace, Invoicing)



## Preliminary Contract Mgmt. Implementation Timeline





# Other Procurement Initiatives and News

## University-Wide Strategic Sourcing - Wave 1

- Partner with key campus stakeholders to establish university wide contracts through strategic sourcing
- Wave 1 target areas include **office supplies, copy paper, standard desktops/laptops, copiers/printers, shipping**

## Reduce Paper P2P Processes

- Review all P2P processes to identify opportunities to reduce the amount of paper utilized by campus and Procurement Services
- Processes under review: **vendor invoice processing, check request, travel and expense reimbursement**

## Partnership and Collaboration with Campus

- Collaborate with key functional areas:
  - Quarterly Campus Procurement Forums
  - Partner with OTS on desktop/laptop and office equipment sourcing efforts
  - Partner with Sustainability on paper process reduction



## Provide Guidance and Ensure Compliance

- Review/update Procurement policies and procedures to incorporate leading practices
- Update processes and forms to reduce risk and comply with regulations
- Create user friendly reference guides, educate campus on right process

# Update to Procurement Requirement

## *Update to Policies Coming in Nov. 2018*

- ❖ The new policy will detail the **procurement thresholds and requirements**, as well as best practices, **for ALL funding sources**, grants and non-grants, and in compliance with Federal Uniform Guidance (UG) requirements

- ❖ **High level overview:**

Procurement Requirement	Threshold - ALL Sources	Process and Documentation Required
Micro Purchase	< \$10,000	No Documentation Required
Small Purchase / Simplified Acquisition Threshold	>\$10,000 to \$250,000	Obtain at least 3 documented quotes; complete Vendor Selection Form; complete Sole Source Justification if applicable
Large Purchases	> \$250,000	Formal bidding/RfX process and written documentation required; complete Vendor Selection Form

- ❖ **Sole Source Justification:** due to updated UG and Illinois Tech's audit findings, there is now increased scrutiny on **ALL Sole Source Justification**
- ❖ **Stay tuned for additional announcements and updates**

**Discussion:**

***We would love to hear from you!***

***What is another spend area or purchasing /  
accounts payable process that you feel we  
can further improve on?***

# Banner 9 Requisitions Demo

- ❖ Wednesday, October 31: Banner will officially upgrade to Banner 9 INB
- ❖ **Thursday, November 1: *All purchase requisitions will need to be submitted through Banner 9 INB***
- ❖ **Banner 8 Self Service** should still be used for all other finance activities, such as approvals and queries

# *Questions & Answers*