



BOSTON COLLEGE



Agenda

- Procurement Services Contracts and Grants
- FY'14 Customer Satisfaction Survey
- Travel Program
- PCard



Procurement Services Contracts and Grants



Value Proposition

- Strategic Sourcing is one of the fastest and most significant ways to **increase Operating Income or meet budget commitments**
- Strategic Sourcing is NOT about switching to low quality products and suppliers. It IS about leveraging an organization's purchasing power to identify the **best value, quality and service** available in the marketplace
- Strategic Sourcing is effective in decentralized organizations. It is not about “centralizing procurement”, but rather “coordinating the procurement process to fully **leverage the organization's purchasing power**”

What We Do in Procurement Services

- **Eliminate risk** and deliver a **significant ROI**, driving profitability and compliance with University policy including those purchases made on contracts and grants
- Partnering with Schools and Departments to provide comprehensive and a flexible approach by combining :
 - **YOUR** in-depth **industry expertise**
 - **OUR Best practices and techniques** in sourcing and procurement
- **NOTICE: We must be sure policies are enforced or we may lose current or future grant funding**

Value Proposition (cont'd)



- **University wide contracts** and department specific contracts
- **Due Diligence** and/or **pre-qualification** information to make sure vendors are a viable source. (Alumnus, disadvantaged vendor programs, etc.)
- **Facilitation Services**, sustainability information on equipment or products (HVAC, electrical, energy star, heat output)
- **Transactional Efficiency** - e-commerce sites
- **Standards** for the University where it is efficient to have a University wide contract
- **Request for proposal creation.** Many times you may be too close to the project and make assumptions about what the vendor will include without putting it in writing. We may look for alternatives or ask questions that may trigger thought. We want to make sure all vendors have the same information so that they have a **fair and equitable playing field**
- Invitation to bid for less complicated projects
- **Bid Analysis and University perspective**
- **Negotiations and Contract Reviews**



The Strategic Sourcing Framework

- **Strategic Sourcing:** is a collaborative team-based approach that aligns sourcing goals with the organization's mission while leveraging targeted expenditures with the best providers to maximize value received.





When to Contact Procurement

- **Purchases >\$5,000 OR** Contract-related **OR** Combined total >\$5,000 (multiple purchases with same supplier)
- Both GOODS and SERVICES >\$5,000 must be bid
- Sole Source procurements ARE **negotiable**
- Contact Procurement **EARLY on** purchase@bc.edu

Purchase <\$5,000

- When possible:
 - Use a BC contracted supplier
 - Use a PCard
- Professional services / consultants (68390)
 - Best Practice require an agreement (agreement must be done for \$5000 or over)
 - Standard PSA is available on-line to be reviewed with Procurement for scope before signing.

Purchase >\$5,000

- Procurement Services will assign a buyer that will assist with:
 - Identifying existing contracts with preferred vendors (WB Mason, Ricoh, Eagle Print, etc.)
 - Explain standards and policies for the University
 - Assist with research for a Request For Proposal (RFP)
 - Help identify qualified suppliers

- **Note: Requisitions may be used and reference the contract if you want to hold funding for later payment**

What is the process for requisitions, POs, vouchers, and invoices?



- **Step 1** – Contact Procurement if you need to make a purchase over \$5,000, to see if a contract is available or if a bid or RFP needs to be created or to negotiate pricing and contract terms of a sole source purchase.
- **Step 2** - RFPS must be done by Procurement.
 - There are a lot of requirements within the bid process.
 - sending bids out at the same time
 - a fair playing field—same submission time, same info to all
 - confirming confidentiality of bids,
 - Sealed Bid Opening requirements, etc.
- **Step 3** - Procurement will analyze the RFP responses
- **Step 4** – Procurement will work with you to select a vendor, negotiate the terms, and create a contract.



Sole Source Justification

- **Definition:** The term "**no-bid contract**" is a popular phrase for what is officially known as a "**sole source contract**" which means that there is **only one person or company that can provide the contractual services needed**, so any attempt to obtain bids would only result in that person or company bidding on it.
 - Examples include:
 - Unique product patent
 - Manufacturer items required
-
- **Sole Source documentation** must be provided to and approved by Procurement Services once the evidence is reviewed.
 - Sole Source Justification is not required for **contracted suppliers**. Suppliers with expired contracts DO require a sole source justification.
 - The **Sole Source Justification Form** (www.bc.edu/procurment) is submitted by the department to Procurement Services for review and approval PRIOR to the purchase.
 - **Note:** A vendor being "world class" or "the best" or "familiar with our requirements" is not considered sole source justification. **Evidence is required** to confirm there is no other vendor who is able to provide the product or service, and the reason for the claim. Procurement must review and approve of the evidence for audit.



- **Contract preparation and/or review (including BC terms and conditions):**
 - Privacy and Security Addendum
 - Insurance
 - Parking
 - Employee Removal
 - Independent Contractor Rules for IRS
- **Data Security:**
 - Please be sure you are **not storing or passing personal information** on forms, reports, receipts, invoices, etc.
 - Receipts for reimbursement should not contain **account numbers** (Do not include stub portion)
 - **New vendors** should be directed to the “**Vendor Create Form**” available on-line
 - Invoices should **not contain SS#s**
 - Contracts contain deliverables
- **Additional Considerations:**
 - Payment Terms, 2%10, Net 30 (currently N30)
 - Make sure deliverables are received before the expected payment dates – if not, notify Procurement.
 - It is not uncommon for a contract to “get away from you.” If deadlines are slipping or you are not getting what you need—call us to review the project.
 - Vendors submit invoices to procurement, **noting the PO #** so Procurement can process payment to the vendor.

What is the PeopleSoft Process AFTER the RFP and Contract Review?



- **Requisitions (Req)** are created by the department as requests for a product or service and need to be approved by the department and OSP if appropriate. They confirm funding is available and the expense is allowable.
- **Purchase orders (PO)** are made from requisitions and are sent to the vendor giving them notice that BC is placing the order with them under the terms indicated (may be reference to a contract). **The PO is also a guarantee to the vendor that the funding associated with the contract is reserved.**
- **Purchase Order (PO) Payment:**
 - The vendor will **submit invoices to Procurement**, after the deliverables have been met.
 - It is up to the department to **notify Procurement if there is an issue**, or if payment should not be made.
 - Procurement will create a **VOUCHER** to pay the vendor.

Summary + Additional Resources



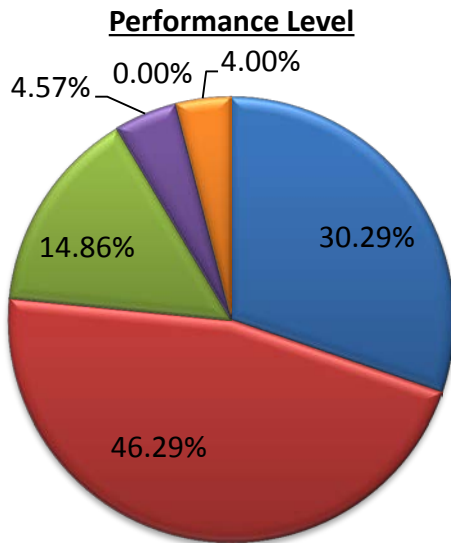
- **Summary:**
 - YOU are the subject experts
 - We can help with the procurement
 - Procurement is involved in Services and Goods, all purchases >\$5,000
- **Additional Resources:**
 - We also provide training sessions on PeopleSoft processes, PCard and Travel
 - Information on Procurement Services is located on the BC web site at www.bc.edu/procurement
 - Information for vendors, such as tax exempt certificates, holidays, or credit information is also on our web site at www.bc.edu/suppliers
 - Travel information is available at www.bc.edu/travel
 - PCard is www.bc.edu/pcard



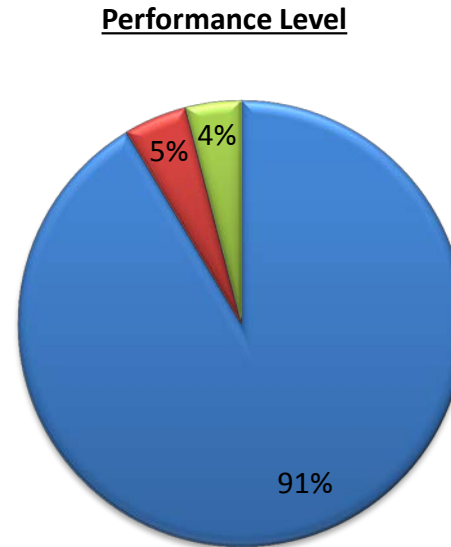
FY'14 Internal Customer Satisfaction Survey



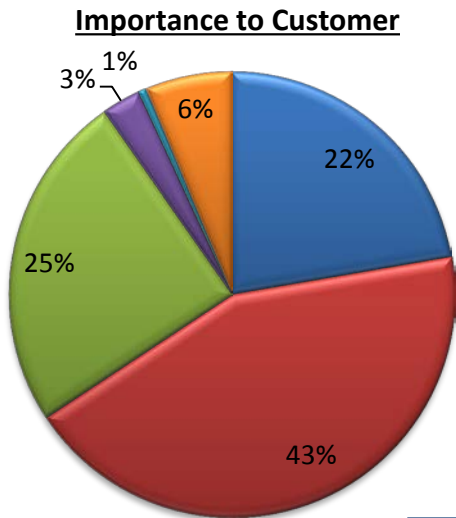
Overall Approval Rate



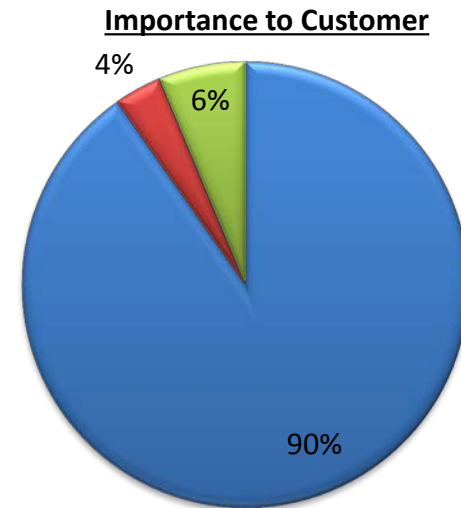
- 5 = Very Satisfied
- 4 = Satisfied
- 3 = Neutral
- 2 = Dissatisfied
- 1 = Very Dissatisfied
- 0 = N/A



- Approval
- Dissatisfied
- N/A



- 5 = Critical
- 4 = Very Important
- 3 = Important
- 2 = Slightly Important
- 1 = Unimportant
- 0 = N/A



- Important
- Unimportant
- N/A

NOTE: 100% = 493 participants



Overall Approval Rate by Commodity

	<u>Approval</u>	<u>Dissatisfied</u>	<u>N/A</u>
Technology	48%	7%	45%
Facilities	43%	5%	52%
Office Supplies	57%	4%	39%
Travel	49%	7%	43%
Furniture	40%	10%	51%
Copiers	43%	6%	52%
Scientific Equipment	19%	1%	80%
Professional Services	29%	7%	64%
Athletic Supplies	6%	2%	93%



Payment Processing

	<u>Approval</u>	<u>Dissatisfied</u>	<u>N/A</u>
PCard	72%	6%	22%
Voucher	38%	20%	42%
Requisitioning	37%	15%	48%
Nolij	26%	7%	66%
Electronic Expenses	77%	1%	22%
Receipts via mobile?	70%	8%	22%
Invoice Process Satisfactory?	75%	9%	16%



Technology

	<u>Approval</u>	<u>Dissatisfied</u>	<u>N/A</u>
PeopleSoft Requisitioning system is easy to use.	46%	13%	41%
The time it takes to approve an Appropriation is reasonable.	34%	10%	56%
Marketplace Needed	80%	2%	17%

NOTE: Items displayed showed the 'Importance to the customer %' is at least 10% larger than the 'Performance Level %' (shown below)



Training and Documentation

	<u>Approval</u>	<u>Dissatisfied</u>	<u>N/A</u>
PeopleSoft training	57%	4%	38%
PeopleSoft Financials step-by-step guides	53%	5%	42%
PCard training	68%	4%	28%
PCard step-by-step guides	66%	5%	29%
Procurement website usefulness	66%	9%	25%
Procurement website is easy to navigate.	68%	7%	26%
Procurement website provides relevant content.	69%	4%	27%
PCard training on the Procurement website	62%	3%	35%
Phone calls, e-mails answered promptly?	77%	5%	19%
Communications on changes in policies, procedures, contracts, etc.	77%	7%	16%

Comments

- “We greatly appreciate the high level of attention, dedication and professional support we get in very complex deals with vendors.”
- “Just a "shout-out" of gratitude to Kathy Coholan - who is a wonderful colleague and whose thoroughness and expertise has been invaluable to my Research Services team in Information Technology in working with ITS Purchasing to negotiate large analytical software contracts. Bravo Kathy C.”
- “BC Procurement meets and exceeds all my standards and needs.”
- “Keep up the good work.”
- “Paul McGowan has been a terrific, vital partner to much of the work that we do with consultants. I have learned a great deal from him and he has been incredibly professional and helpful.”
- “Procurement always goes above and beyond in assisting the end user.”
- “Again I am not directly involved with Procurement Services, but my interactions with them during RFPs have been at either a 4 or 5 rating. I would like to learn more about the process though.”
- “Procurement Services team has been a critical partner in our success.”
- "Again thanks so much to Kathy Coholan - the 'face'" of Procurement for our team. Kathy exemplifies professionalism and ""cura personalis."" Kathy - keep up the great work and thank you.”
- "Cecilia McClay is always willing to help us out in any way. She is extremely knowledgeable and an asset to Procurement Dept. Carolyn Donoghue is also a wealth of information and is always willing to assist us she is also an asset to the Procurement Dept."
- “I have learned to work with the system for my specific responsibilities, and find that people are always helpful when I need to seek out assistance.”
- “Jeri Cole-Lauziere and Cecilia McClay are an absolute dream to work with ... from helping get and sort through bids from printers to publish our books—to helping us deal with problems and negotiate solutions with vendors. It is great knowing they are there through the whole process.”



TakeAways

- Accomplishments:
 - 91% Approval Rate
- Goals:
 - Technology
 - Marketplace
 - Appropriation Process
 - Requisitioning Process



Travel Program



Travel Program

BOSTON COLLEGE

A - Z BCINFO MAPS DIRECTORIES

Search BC

GO

ABOUT BC ACADEMICS ADMISSION ATHLETICS GIVE TO BC LIBRARIES ON CAMPUS RESEARCH



BC TRAVEL

- The Travel Collaborative
- Egencia Corporate Travel
- Shorts Travel for Groups
- Amex Corporate Card Application & Benefits
- Amex Department Corporate Card
- Discount Airfares
- Vehicles
- Hotel Information
- Discount Amtrak
- Helpful Links For Travelers

[bc home](#) > [offices](#) > travel info home

BC Travel

Welcome to the Travel Information Web site. This site has been designed to provide Boston College faculty and staff with information related to Boston College travel policies and discounts. If you have any questions about travel or this Web site, please contact Carolyn Donoghue 2-8911. You can also email questions to purchasing@bc.edu.

[Travel Policy](#)

Planning to travel for Boston College business? Read the Boston College [Travel Policy](#) before you go so you know what receipts to save, and more.

[American Express Corporate Card](#)

Have you been meaning to get an AMEX Corporate Card so you can keep your travel expenses separate? [Apply now](#).

[On-Line Travel Agency - Egencia Corporate Travel](#)

Egencia will match any flights found at a



News and Updates

[Mileage Reimbursement Rate](#)

The mileage reimbursement rate as of January 1, 2014 is \$0.56.

[Verifying/Selecting a Bank Account for Expense Reimbursements](#)

If you would like to verify or change the bank account for your expense reimbursements, please click [here](#) for



PCard Documentation and Training

PCard



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A - Z BCINFO MAPS DIRECTORIES

Search BC

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ABOUT BC ACADEMICS ADMISSION ATHLETICS GIVE TO BC LIBRARIES ON CAMPUS RESEARCH



PROCUREMENT SERVICES

- General Information
- Bidding Policy
- Category and Supplier Information
- Purchasing FAQs
- Year-End Information
- Travel

► **Purchasing Card Program**

- Obtaining A P-Card
- P-Card User's Guide
- P-Card Questionnaire
- Cardholder Agreement
- Frequently Asked Questions
- Pcard Receipt Retention Policy
- P-card Access-on-line lab for Cardholders
- Complete P-card Lab

[bc home](#) > [offices](#) > [procurement](#) > purchasing card program

Purchasing Card Program

PROCUREMENT SERVICES

[Pcard Policy](#)

[The Departmental P-Card Administrator's Role and Responsibility](#)

[Complete Guide to P-card Reconciliation for the Departmental P-card Administrator](#)

[Receipts for Contracted-Level 3 Vendors](#)

Scanned Receipts and Statements: The Controller has approved the use of scanned versions of purchasing card (P-Card) receipts and p-card statements, after reconciliation, as an approved method of retention for the University. Scanned receipts will last longer, are less likely to be lost, and can be shared with the applicable P1, P2 or Audit, depending on how the file is secured. As with any method of retention, including hard copy, account numbers



Thank you for your efforts regarding the Pcard Survey. 92% Satisfaction Rating on '07 Survey. ([More Detail](#))

Need additional help?

Contact: Cecilia McClay at 2-0817
or email: pcard@bc.edu



THANK YOU