

Procurement Metrics and Customer Service



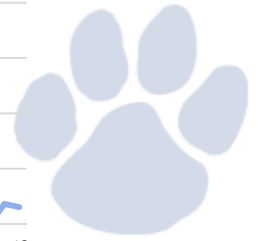
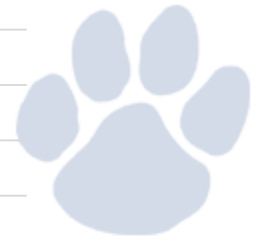
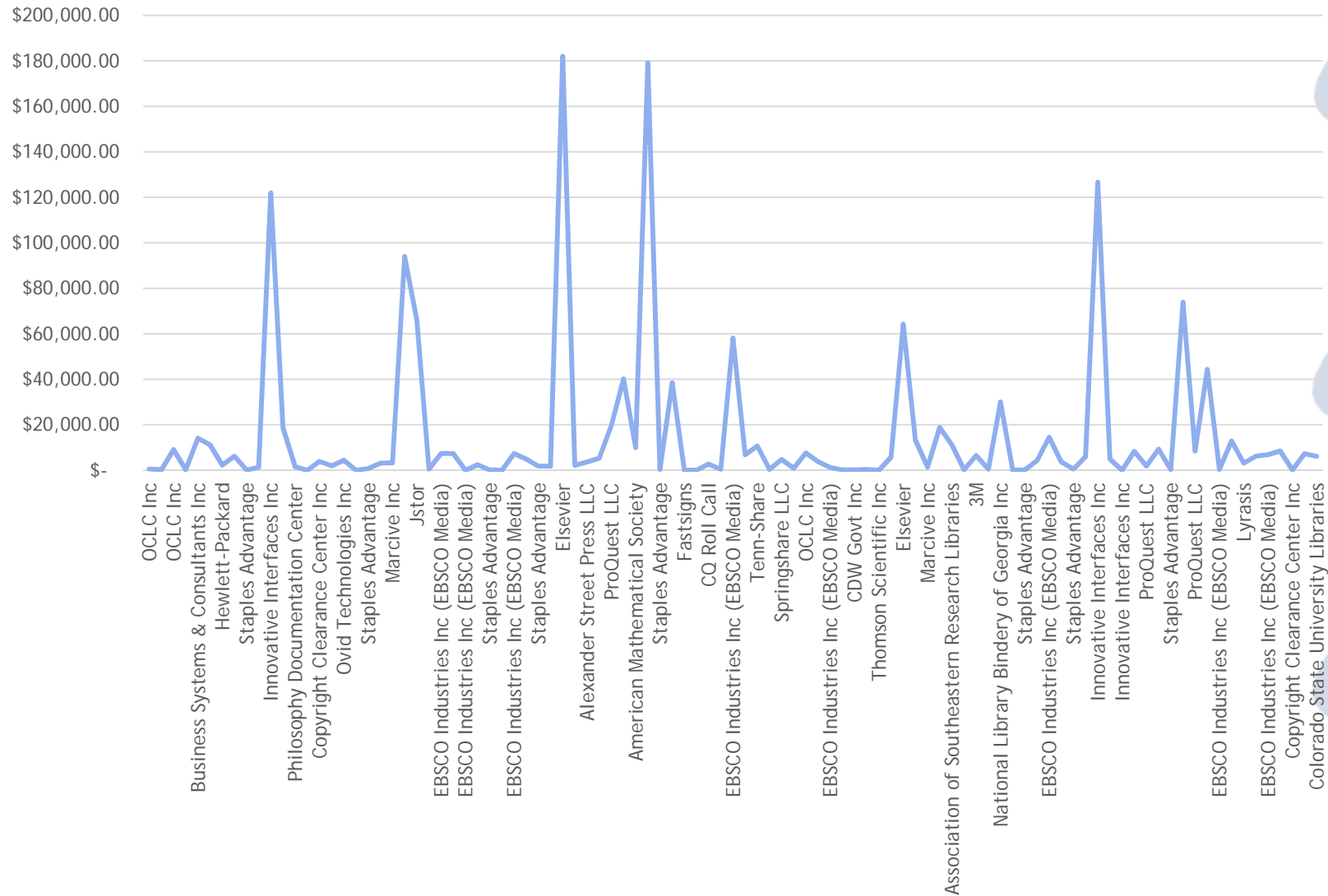
Procurement and Contract Services



SciQuest - Search History

- The Document Search function provides our customers unlimited data on the history of requisitions, purchase orders, invoices, receipts, contracts, suppliers, buyers, requesters, approvers, descriptions, FOAPs, date ranges, workflow status, cancellations, status flags, custom fields, etc.
- Other customer service benefits: Analyze spend by supplier to determine if a bid process is needed to create negotiated contracts, plan strategic sources, negotiate better contract pricing with an existing contracted supplier, attend planning sessions with departments to anticipate their needs
- The following slide provides an example of history data collected and presented to University Libraries showing supplier spend frequency in order to sync renewal terms by fiscal year


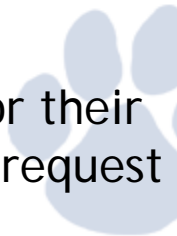
Requisition Totals



SciQuest - Contract Manager



Contract Manager is a central contract management repository used to:

- Streamline operations through contract lifecycle management
 - Increase cost savings and maximize revenue by eliminating contract inaccuracies and non-compliance
 - Fulfill commitments on time with alerts and reminders
 - Automatically assigns contract number to requisitions and purchase orders to track spend
 - Track budgets, renewal options, contract terms, and expirations
 - Search contracts by status: active, inactive, expired and future
 - The following slides provide an excellent tool for customers to monitor their contracts, receive automatic reminders by email, and plan for future request for proposals
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Contract Header - Windows Internet Explorer

https://solutions.sciquest.com/apps/Router/ContractHeader?contractId=93924&tmstmp=1434646665336

File Edit View Favorites Tools Help

Convert Select

Favorites New Tab Suggested Sites Web Slice Gallery

Contract Header

tigerbuy

Constance Butts Action Items 43 Notifications 2 0.00 USD

Type Contract Status - Upload Main Document

Summary

The Contract ▾

Header ✓

Attachments 4

Contract Family

eProcurement >

Settings >

Contract Number * RFP37472251

Contract Name * Technical Innovation, LLC

Contract Type

Supplier Name * Technical Innovation LLC

Contract Status

Summary

Only Manufacturers listed on contract; Standard Classroom Audio Visual Technology equipment, supplies, services, training, and support maintenance. Contractor shall provide the design, installation, and integration of three (3) standardized classroom with audio/visual technology equipment, supplies, and services from a selected list of manufacturers. An Itemized price lists of 3 standard systems 1)Standard Conference System 2)Standard Digital Smart Classroom System, and 3) Standard Auditorium System, are included in this contract. CD's of prices for additional equipment is available on CD's at ITD and Procurment and Contract Services. See contract attached. Contractor agrees to offer to other TBR Universities and Institutions. Edit Summary

Dates and Renewal

Time Zone * CDT/CST - Central Standard Time

Start Date * 06/01/2013 12:00 AM

End Date * 05/31/2018 11:59 PM

Internet | Protected Mode: On 100%

contract terms

Notifications - Windows Internet Explorer
https://solutions.sciquest.com/apps/Router/ContractNotifications?contractId=93924&tmstmp=1434647392977
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tigerbuy
Constance Butts | Action Items 43 | Notifications 2 | 0.00 USD

RFP37472251
Technical Innovation, LLC
Type
Contract Status -
Upload Main Document
Summary
The Contract >
eProcurement >
Settings >
Users and Contacts
Notifications

Notifications

Contract Actions | History | ?

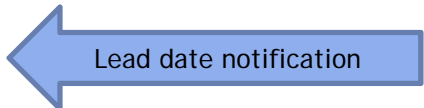
Who should receive each notification type?

Notification Types	Contract Managers	Stakeholders	External Contacts
Contract Dates	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Budget Exceeded	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Percentage Tiers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Amount Tiers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Contract Date Notifications

Leave a lead time blank to turn that contract date notification off.

Start Date Lead Time Days
End Date Lead Time Days
Renewal Date Lead Time Days



Actual Spend - Windows Internet Explorer

https://solutions.sciquest.com/apps/Router/ContractActualSpend?contractId=93924&tmstmp=1434646742213

File Edit View Favorites Tools Help

Convert Select

Favorites New Tab Suggested Sites Web Slice Gallery

Actual Spend

tigerbuy Constance Butts Action Items 43 Notifications 2 0.00 USD

Catalogs and Contracts > Contracts > Search Contracts > Actual Spend

RFP37472251
Technical Innovation, LLC

Type
Contract Status -
Upload Main Document

Summary

The Contract >

eProcurement >

Setup
Budget

Actual Spend

Applies To
Goods and Services
PO Clauses

Settings >

Actual Spend Contract Actions History ?

Type	Amount %	
Actual PR Spend	2,930,138.35 USD (19.5%)	View All Requisitions
Actual PO Spend	2,886,110.35 USD (19.2%)	View All Purchase Orders
Actual Invoice Spend	2,747,439.32 USD (18.3%)	View All Invoices

Contract Reports

Contract spend by department report	export
Contract summary report	export
Top 50 items report	export

Save Changes

Internet | Protected Mode: On 100%

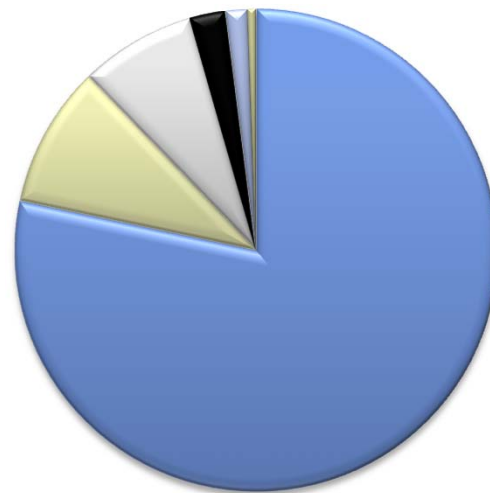
Reports and Financial Controls

- The University uses SciQuest, Banner, Ionwave and Argos to provide procurement and contract metrics to management:
 - Track cycle time from requisition submission to original PO revision to maximize service to campus customer by processing the most purchases completed in the shortest amount of time
 - Purchase and spend reports by date range; top items purchased; number of requisitions, purchase orders, contracts, and pcards quarterly and annually
 - Quarterly contract reports
 - Diversity spend
 - Bid Recap
- Financial Controls - Ensure financial and process controls are in place to minimize audit findings using measures, benchmarks, results, and improvement actions by fiscal years

Cycle Time - Previous Fiscal Year (7/1/2013-6/30/2014)

(PR submit date to PO original revision date)

Total number of documents for this period: 16,896
88% of POs sent to suppliers within one day of receipt of requisition



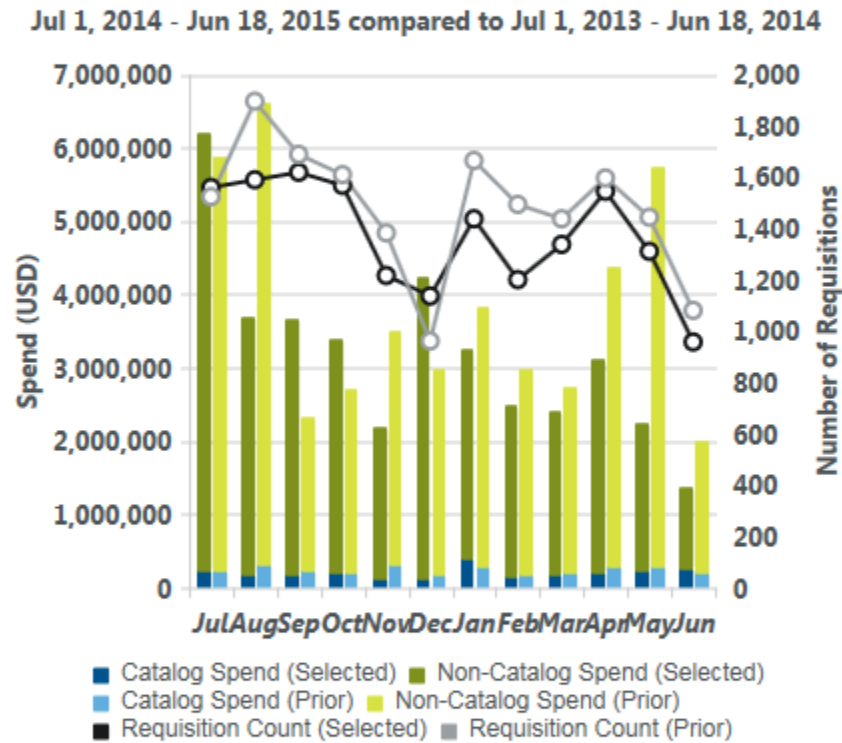
- 0 Days (78.3%)
- 1 Day (9.5%)
- 2-5 Days (7.8%)
- 6-10 Days (2.4%)
- 11-29 Days (1.5%)
- 30+ Days (0.6%)



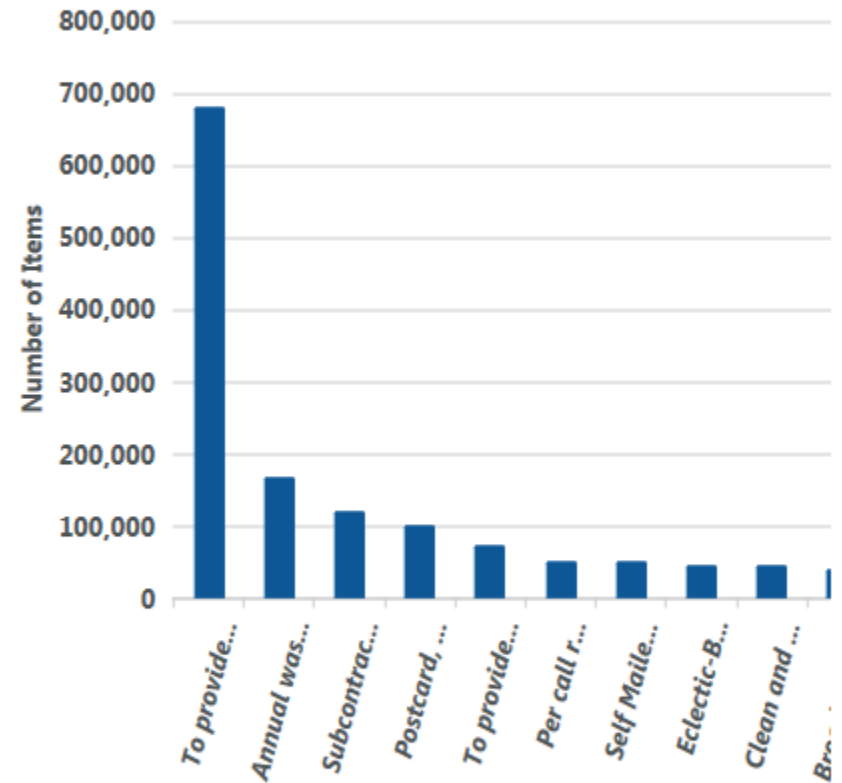
Spend Dashboard

[New to this page?](#) ?

Organizational Spend [Show Filters](#) [Maximize](#) ?



Top Items Purchased [Show Filters](#) [Maximize](#)





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Welcome crobbns!
Workgroup: UMemphis

- Home
- Bids
- Auctions
- Suppliers
- Admin

Responding Suppliers (RFQ61395248 Addendum 4)

[Return](#) [Award Supplier](#)

Supplier	Items Responded	Response Total	Note to Buyer
<input type="checkbox"/> Contract Carpet Specialists [View Response]	2	67,020.00	
<input type="checkbox"/> Haralson Property Resources, LLC [View Response]	2	79,848.00	
<input type="checkbox"/> Artisent Floors [View Response]	2	95,720.00	

Items 1-3 shown of 3

1

Pending Awarded Suppliers

No Pending Awarded Suppliers

Bid Line Items

Description	Contract Carpet	Haralson Proper	Artisent Floors
1 Broadloom carpet - Eclectic - color is water. Price includes removal of existing carpet, disposal of removed carpet, normal floor prep, install of new carpet, glue as needed, rubber transitions at all doorways, furniture moving, and dumpster fees. Quantity: 38,800 UOM: SF	\$1.65 (38,800) \$64,020.00	\$1.96 (38,800) \$76,048.00	\$2.40 (38,800) \$93,120.00

Procurement and Contract Services FY2012-15 Goals

Outcomes	Assessment Measures and Instruments	Benchmarks and Assessment Cycle	Results	Improvement Actions
<p>1. Purchase Order Cycle Time. Maximize service to campus customers by processing the most purchases completed in the shortest amount of time. (Process and Customer Service Improvements, Goal 5: Campus Culture and Service Excellence Strategies 3,4,5)</p>	<p>Procurement and Contract Services monitors the time required between a customer's submission of a requisition and the issuing of a purchase order to a supplier.</p> <p>PO cycle time is analyzed quarterly through the SciQuest system and documented in the "PO Cycle Analysis" report.</p> <p>Effectiveness is measured by the percentage of purchase orders issued within specified days after the requisition.</p>	<p>All benchmarks and results are monitored quarterly on a university fiscal year (July-June) basis.</p> <p>Benchmarks: Percent of purchase orders sent to suppliers within one (1) day of receipt of requisition.</p> <p>FY12: 89%</p> <p>FY13: 89%</p> <p>FY14: 86% (revised dn)</p> <p>FY15: 86%</p>	<p>Actual Results (percent of POs issued within one day of requisition):</p> <p>FY11: 87%</p> <p>FY12: 90%*</p> <p>FY13: 88%</p> <p>FY14: 88%*</p> <p>FY15:</p> <p>*Exceeded benchmark</p>	<p>FY12: Established systematic communication and training opportunities with business officers and users to strengthen procurement processes</p> <p>FY13: Increased number of contracts available under TigerBuy system. Expanded user training through division meetings. Also, modified benchmark for FY14 to a more realistic goal of 86%.</p> <p>FY14: Increased University access to negotiated contracts to change extended bid periods into one day orders</p> <p>FY15:</p>

Outcomes	Assessment Measures and Instruments	Benchmarks and Assessment Cycle	Results	Improvement Actions
<p>2. Diversity Suppliers. Foster strong economic benefits to the community through purchases from small, minority-owned, and women-owned businesses. (Process and Customer Service Improvements, Goal 5: Campus Culture and Service Excellence Strategies 3,4,5)</p>	<p>Procurement and Contract Services categorizes all suppliers by diversity status and monitors the amount of university funds spent with diversity and other suppliers.</p> <p>Percentage of spending with diversity suppliers is recorded and reported on the Banner system and the quarterly "TBR Minority Report."</p> <p>Effectiveness is measured by the percentage of funds spent with four types of diversity suppliers: Small businesses Minority-owned businesses Women-owned businesses Disabled Veteran businesses (New FY15)</p>	<p>All benchmarks and results are monitored quarterly on a university fiscal year (July-June) basis.</p> <p>Benchmarks: Percent of funds spent with type of diversity supplier each fiscal year.</p> <p>Small Businesses: FY11: 13.0% FY12: 13.5% (revised up) FY13: 12.5% (revised dn) FY14: 12.5% FY15: 9.7% (revised dn)</p> <p>Minority-Owned Businesses FY11: 3.0% FY12: 3.5% (revised up) FY13: 3.5% FY14: 3.5% FY15: 3.1% (revised dn)</p> <p>Women-Owned Businesses FY11: 8.0% FY12: 8.5% (revised up) FY13: 6.0% (revised dn) FY14: 6.0% FY15: 6.0%</p> <p>Disabled Veteran Businesses (New) FY15: .05%</p>	<p>Actual Results (percent of university spending with diversity suppliers):</p> <p>Small Businesses: FY11: 9.9% FY12: 12.5% FY13: 10.0% FY14: 9.3% FY15:</p> <p>Minority-Owned Businesses FY11: 3.1% FY12: 4.1%* FY13: 3.3% FY14: 2.8% FY15:</p> <p>Women-Owned Businesses FY11: 6.7% FY12: 5.8% FY13: 5.3% FY14: 5.9% FY15:</p> <p>Disabled Veteran Businesses FY15:</p> <p>*Exceeded benchmark</p>	<p>FY12: Participated in matchmaking events with diversity suppliers and provided users with contacts and information. Provided upcoming procurement opportunities to MMBC & the Governor's Office of Diversity. Also, changed the benchmarks for FY13 based on FY12 results: Small: 12.5% Minority: 3.5% Women: 6.0%</p> <p>FY13: Hosted booth at MMBC Economic Development Conference to help diversity businesses compete for contracts.</p> <p>FY14: Reviewed four years of results and found that the higher FY12 results seemed to be an anomaly.</p> <p>FY15: Revised all diversity benchmarks for FY15 to slightly higher average of FY11, FY13, and FY14 results: Small: 9.7% Minority: 3.1% Women: 6.0%</p>

Outcomes	Assessment Measures and Instruments	Benchmarks and Assessment Cycle	Results	Improvement Actions
<p>3. Financial Controls. Ensure financial and process controls are in place to minimize audit findings. (Financial Controls, Goal 5: Campus Culture and Service Excellence Strategy 5)</p>	<p>Procurement and Contract Services revises or adds procurement/contract policies and procedures as needed to reflect changes in TBR, University and State policies.</p> <p>Policy and procedure changes are communicated in written form, Website, and through formal and informal training</p> <p>Effectiveness is measured by internal and state audits.</p>	<p>All benchmarks and results are monitored annually on a university fiscal year (July-June) basis.</p> <p>Benchmarks: Audit findings</p> <p>FY12: No-finding audit</p> <p>FY13: No-finding audit</p> <p>FY14: No-finding audit</p> <p>FY15: No-finding audit</p>	<p>Actual Results:</p> <p>FY11: No-finding audit</p> <p>FY12: No-finding audit</p> <p>FY13: No-finding audit</p> <p>FY14: No-finding audit</p> <p>FY15:</p>	<p>FY12: Established monthly systematic Tigerbuy communication and training/retraining opportunities. Expanded user training through annual contract training.</p> <p>FY13: Expanded user training through divisional, department and one-on-one meetings. Expanded user training through presentations at Focus on Finance meetings.</p> <p>FY14: Revised P-Card procedures and continued systematic training/retraining opportunities.</p> <p>FY15:</p>

Keeping Customers Happy

