



WILLIAM & MARY

PROCUREMENT SERVICES

Supplier Diversity @ W&M

VALUE . SERVICE . QUALITY



The mission of Procurement Services is to support William & Mary 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 compliance, with attention to corporate social responsibility both within the institution and among its Suppliers.

This update provides a closer look at inclusive excellence within W&M Procurement Services through supplier diversity and efforts to expand utilization and encouragement of small, woman-owned, minority-owned and disabled veteran owned businesses.

Supplier Diversity @ W&M

The Need for Supplier Opportunity in Higher Education

Approximately 724,000 or 99% of Virginia based businesses are small businesses. Small, Women-owned, and Minority-owned (SWaM) businesses are the source of most new jobs in Virginia.(source: US Small Business Administration). SWaM businesses contribute to stimulating Virginia’s economy as well as encouraging business growth and development in the state in which we work, and where we live. Virginia's SWaM program was established in 2006 to enhance business opportunities for these underrepresented businesses. Administered in Virginia by the Department of Small Business and Supplier Diversity (SBSD), there are approximately 14,000 SWaM certified businesses in Virginia.

Diversity & Inclusion is an integral part of William & Mary’s campus community. Within the overarching university Diversity & Inclusion mission, we value our diverse suppliers for their different perspectives, skills and backgrounds.

William & Mary Supplier Diversity SWaM Goals for FY20

The University (W&M and VIMS) has a 42% of discretionary expenditure goal for the utilization of SWaM suppliers, and a 50% goal for capital construction subcontracting. The following table shows the breakout per category.

Small	Women	Minority	Micro*	Service Disa-	SWAM
29%	7%	4%	1%	1%	42%

In Fiscal Year 2019, William & Mary achieved 41% SWaM spend (including second-tier suppliers)

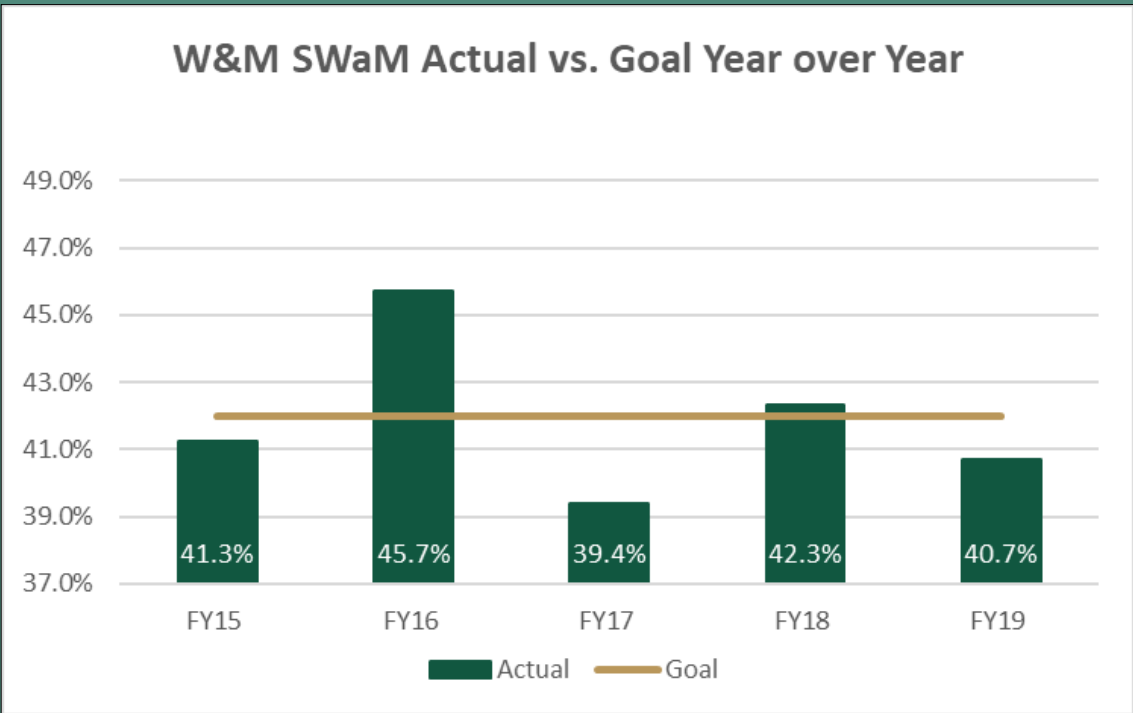
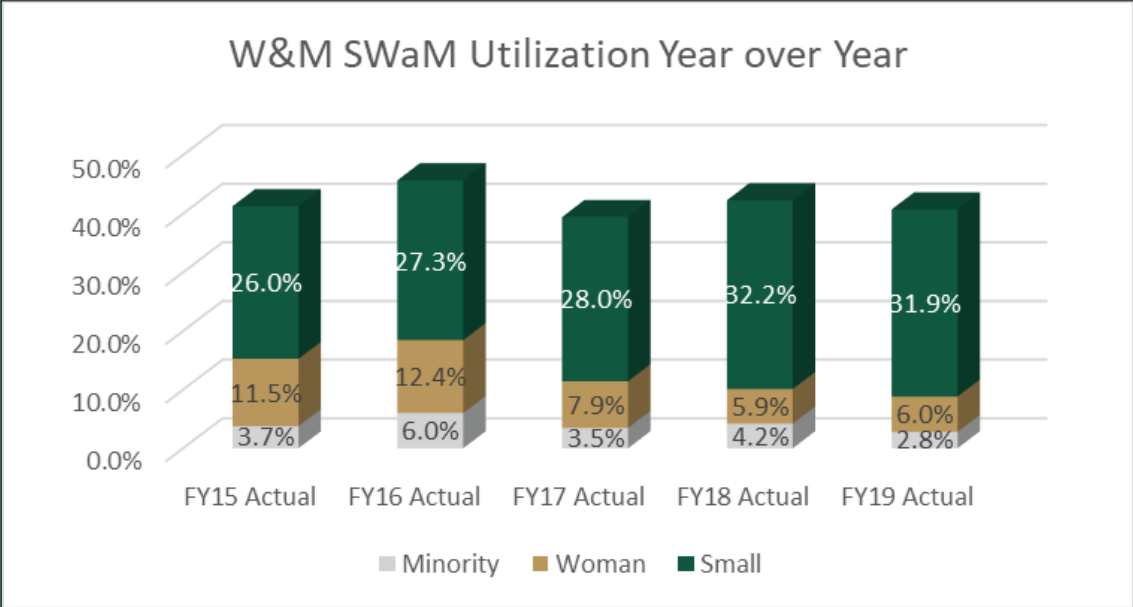
Dashboard Summary
Data Submission



Agency: College of William & Mary
Agency No (s): 204
Fiscal Year (YYYY): 2019

Qtr	1	2	3	4	FY Total	
Summary	SWaM Direct	8,855,041 28.9%	8,514,680 25.0%	8,941,875 30.6%	8,031,930 26.5%	34,343,526 27.7%
	SWaM 2nd Tier	3,147,472 10.3%	8,000,589 23.5%	2,050,141 7.0%	2,988,924 9.9%	16,187,126 13.0%
	Total SWaM	\$12,002,513 39.2%	\$16,515,269 48.5%	\$10,992,016 37.6%	\$11,020,855 36.4%	\$50,530,652 40.7%
	Total Non SWaM	\$18,592,496 60.8%	\$17,509,840 51.5%	\$18,265,464 62.4%	\$19,239,128 63.6%	\$73,606,928 59.3%
	Total Discretionary Spend	\$30,595,009 100.0%	\$34,025,109 100.0%	\$29,257,480 100.0%	30,259,983.16 100.0%	\$124,137,581 100.0%
MBE	MBE Direct	346,969 1.1%	382,429 1.1%	387,081 1.3%	850,017.74 2.8%	1,966,497 1.6%
	MBE 2nd Tier	1,168,974 3.8%	57,988 0.2%	105,443 0.4%	174,167.15 0.6%	1,506,572 1.2%
	Total MBE	\$1,515,944 5.0%	\$440,417 1.3%	\$492,524 1.7%	\$1,024,185 3.4%	\$3,473,070 2.8%
WBE	WBE Direct	1,429,538 4.7%	1,292,193 3.8%	1,038,822 3.6%	1,222,791.92 4.0%	4,983,345 4.0%
	WBE 2nd Tier	529,388 1.7%	269,591 0.8%	661,063 2.3%	1,042,079.54 3.4%	2,502,121 2.0%
	Total WBE	\$1,958,926 6.4%	\$1,561,784 4.6%	\$1,699,885 5.8%	\$2,264,871 7.5%	\$7,485,466 6.0%
SBE	SBE Direct	7,078,534 23.1%	6,840,058 20.1%	7,515,972 25.7%	5,959,120.61 19.7%	27,393,684 22.1%
	SBE 2nd Tier	1,449,109 4.7%	7,673,010 22.6%	1,283,635 4.4%	1,772,677.79 5.9%	12,178,432 9.8%
	Total SBE	\$8,527,643 27.9%	\$14,513,068 42.7%	\$8,799,607 30.1%	\$7,731,798 25.6%	\$39,572,117 31.9%

Historical Comparison of William & Mary SWaM Goals v Actual



Diversity & Inclusion Lunch & Learn

For the second year in a row, Marra Austin and Bill Vega presented on Supplier Diversity at W&M, during the Office of Diversity & Inclusion's Lunch and Learn. Topics included how to find SWaM vendors with W&M contracts, increasing supplier diversity at W&M, and providing potential opportunities to local businesses through education and outreach facilitated by Procurement Services.

W&M Procurement Services encouraged utilization of SWaM business in the following ways:

- ◆ Hosted an annual supplier diversity event to afford campus opportunity to learn and network with SWaM suppliers—April 11, 2019.
- ◆ Active participant in SWaMfest, October 2018. The largest supplier diversity event in Virginia. W&M participates in the supplier showcase, engages in classes and networking opportunities, and participates in VASCUPP panel.
- ◆ Introduced W&M SWaM businesses to campus business managers during semi-annual P2P Open Forum events. Share SWaM goals and progress toward goals.
- ◆ As possible, expanded the contract base with SWaM suppliers. As an example in FY19, a strategic print contract was awarded to nine suppliers (included seven SWaM options for campus).
- ◆ Procurement Services delivered quarterly Supplier training discussing eVA, SWaM, W&M, & more. Most attendees were SWaM eligible.
- ◆ Expanded SWaM options within the America to Go catering portal.
- ◆ All request for proposals included SWaM utilization as a criteria for consideration.
- ◆ Completed and published annual Commonwealth report template "SWaM Plan".



Areas of Concentration for FY2020

- Create an Inclusive Climate for SWaM Businesses and build partnerships that benefit W&M and Diverse Suppliers
- Make departmental end-users more aware of and accessible to SWaM suppliers through outreach events, direct connections and contract award communications
- Continue to conduct training on SWaM and diversity initiatives to include open house events and trainings for small businesses
- Expand W&M contracted catering portal to identify SWaM businesses and provide a graphical measure of SWaM utilization within the portal (**Attachment A**)
- Amend the Request for Proposal template to include a presidential letter in support of core values including supplier diversity (**Attachment B**)
- Add a SWaM Spotlight section to the monthly procurement newsletter to communicate to the campus community. (**Attachment C**)
- University capital construction will raise subcontracting goals on new projects from 42% to 50% SWaM.
- Provide current University suppliers with an online method of reporting second tier SWaM activity.
- With support from W&M IT, an integration will be created from the Commonwealth accounting system to W&M enterprise resource planning system “ERP”/Banner, to more accurately and completely identify certified SWaM businesses.
- As sourcing specialists conduct client relation management “crm” meetings with key stakeholders, include SWaM opportunities and feedback based on supplier pool.
- All request for proposals will include SWaM utilization as a criteria for consideration.
- Complete and publish annual Commonwealth report template “SWaM Plan”
- Invite SWaM suppliers to participate in W&M bi-annual procure-to-pay forum events in order to interface with campus purchasers.
- Host quarterly training for suppliers with a focus on how to do business in Virginia (eVA/SWaM), and how to do business with William & Mary (and VASCUPP).
- Host an annual campus wide Supplier Diversity event for engagement between suppliers and campus purchasers.



Attachment A

America To Go

America To Go (ATG) is the campus's online catering platform for on-campus food needs. This tool provides a central location to find and order prepared foods for campus needs. In addition to food ordering, ATG serves as a guide to SWaM businesses by identifying SWaM in search results.

ATG search results with SWaM labels

36 matching restaurants

sort by: Name view: More Detail

William & Mary Cate... 200 Stadium Drive	A Sharper Palate 5511 Lakeside Avenue	Aromas 400 Landrum Avenue	Baker's Crust 5234 Monticello Avenue	Baker's Crust Breakf... 5234 Monticello Avenue
Butler's Unique Cate... 10 East Franklin Street	Carrabba's Italian Grill 2500 Richmond Road	Chef By Design Cate... 5318 Fairfield Shopping Ce...	College Delly Catering 336 Richmond Road	Cookie Text 101 Freemans Trace
Creative Cuisines 1300 Garrison Drive	Custom Culinary Co... 8757 Barnes Road	Divine Lunches 7479 Richmond Road	Emily's Donuts and ... 7123 Memmec Trail	Fuddruckers 7750 Tidewater Drive
Goodrich Gourmet C... 112 S 2nd Street	Green Leafe Pub Cat... 765 Scotland Street	Honey Butter's Kitchen 7521 Richmond Rd "Unit B	Illy Caffè Williamsburg 435 West Duke of Glouceste...	Jason's Deli Catering 12515 Jefferson Avenue
Jersey Mikes 4655 Monticello Avenue	Kimberley Ashlee Ca... PO Box 59451	Leon Nixon Catering 749 Virginia Road	Mobile Pig Nic 6637 Indian River Road	Moe's Southwest Gri... 4950 Monticello Avenue
Momo's Cafe 11801 Canon Boulevard	Nawab Indian Cuisine 204 Monticello Avenue	Paul's Deli Catering 761 Scotland Street	Pauls Deli Neighborh... 4345 Newtown Avenue 1135 Reviews on yelp	Smile Ice Cream Dist... 3387 Progress Road
Sno-To-Go 2229 Richmond Road	The Catering Company 108 Ingram Road	The Catering Place 2109 A Holland Road	Which Wich Superior... 4645 Casey Boulevard	White House Catering 1548 East Main Street
Williamsburg Conce... 312 J Lightfoot Road				

ATG search results specifying SWaM

10 matching restaurants

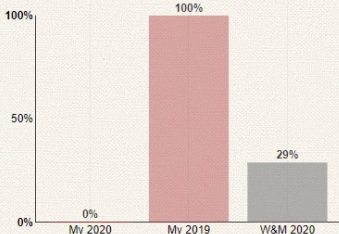
sort by: Name view: More Detail

A Sharper Palate 5511 Lakeside Avenue	Custom Culinary Co... 8757 Barnes Road	Divine Lunches 7479 Richmond Road	Goodrich Gourmet C... 112 S 2nd Street	Leon Nixon Catering 749 Virginia Road
The Catering Company 108 Ingram Road	The Catering Place 2109 A Holland Road	Which Wich Superior... 4645 Casey Boulevard	White House Catering 1548 East Main Street	Williamsburg Conce... 312 J Lightfoot Road

My SWaM Spend

William & Mary's annual SWaM goal is 42%. Help us meet that goal by ordering from SWaM businesses.

- ↓ My spend percent with SWaM vendors is down 100% from last year
- ↓ I am 100% behind W&M on spend percent with SWaM vendors this year



Included on the America To Go (ATG) Dashboard, the My SWaM Spend chart indicates what percentage of individual ATG orders are made with SWaM vendors, and compares this percentage to the total W&M goal vs. actual.

Attachment B



William & Mary

OFFICE OF THE PRESIDENT

October 16, 2019

Dear William & Mary Supplier Community,

William & Mary has set forth a meaningful goal to make 42 percent of its purchases from small, women-owned or minority-owned businesses. This is an essential step to integrate our core value of belonging in every aspect of our operations. We recognize that cultivating a welcoming environment in which people of diverse experiences and perspectives participate fully will require the dedicated support of our on-campus community as well as our numerous suppliers.

I often say that diversity accelerates innovation. Much research has shown that the more diverse the team, the more efficiently and creatively it solves problems and cultivates a positive organizational culture. Those gains will enable William & Mary to provide goods and services to our community as efficiently and affordably as possible.

William & Mary's 42 percent goal also answers a call from the Commonwealth to advance innovation and equity in our broader economy. Virginia's government charged Commonwealth employers to advance equity for the state's small, women-owned and minority-owned (SWaM) and service disabled veteran-owned businesses. We are committed to this shared effort toward greater economic prosperity in our region.

We will be evaluating our contracts systematically for partners who help us reach our goal. We thank you for your partnership in meeting this ambitious goal, as an essential step towards ensuring our community is a creative and welcoming place to work and live.

Sincerely,

A handwritten signature in black ink that reads "KARowe".

Katherine A. Rowe
President

KAR/edm

P.O. Box 8795 • Williamsburg, Virginia 23187-8795 • (757) 221-1693

Attachment C

SWaM Spotlight

Procurement Services has added a “SWaM Spotlight” to its monthly newsletter to communicate with the campus community on SWaM goals and suppliers.

February 2020 Newsletter


WILLIAM & MARY
PROCUREMENT SERVICES

PROCUREMENT SERVICES

Newsletter February 2020

Procure-to-Pay Forum & Supplier Diversity Fair



The Spring 2020 Procure-to-Pay Forum featured updates from Financial Operations and Procurement Services. Thank you to all who were able to attend. To view a video and PowerPoint slides of this event, log into [Cornerstone](#) and keyword search "procure to pay".

Following the Procure-to-Pay Forum, the 7th Annual Supplier Diversity Fair featured representatives from W&M's diverse supplier community of small, women-owned, and minority-owned (SWaM) businesses. Over 30 suppliers attended this year's fair. Special thank you to [TSRC](#), which served as our premier sponsor. For a full list of this year's attendees, with links to their businesses, visit the [Procurement Services website](#).

New ATG Vendors: William & Mary Cafés

Pickup service from William & Mary's Cafés has been added to [America To Go](#). Boxed lunch menus may be found under vendor tiles for ISC III (Element Café), Mason School of Business (Monteolio Café) and Law School (Law Café). To learn more about using ATG, visit [our website](#).

TSRC Homepage Refresh

The [TSRC](#) homepage has a new look! To view the W&M custom page, first [set up an account](#) and log in. We have reviewed thousands of items to find some of the best values in the TSRC catalog. Click on any category to see the selection of filtered, best valued products.


SWaM Spotlight: The Catering Place
The Catering Place is an award-winning organization known for customized menus and innovative presentations. Available through [America To Go](#) and recently featured at the Supplier Diversity Fair, The Catering Place offers full service catering and menus to accommodate any need, including dietary restrictions. For more information on this SWaM vendor, email [Janel Duncan](#) in Catering Sales, or visit [www.mycateringplace.com](#).

FY20 Year End Closing

The closing schedule and deadline dates for Procurement Services and Financial Operations are [available to view online](#). Documents received by the deadline date will be processed in the 2020 Fiscal Year.

Open Lab Training

Do you ... purchase goods and services? Use eVA? Use SPOC? Hire Independent Contractors, Speakers, etc? Procurement Services is holding an open lab on March 12, 2020, 9:30 a.m. - 11:00 a.m. at Jones Hall Rm 203, to help campus clients better navigate procurement systems and processes. This session is open to everyone. For questions, email [procure@wm.edu](#).

Visit us at [www.wm.edu/offices/procurement](#)
Call 757-221-3952 or email [procure@wm.edu](#)

November 2019 Newsletter

- Fine Arts Moving & Storage
- W&M Libraries Software System Migration (Istandora 8 Migration)
- Strategic Printing Open Enrollment
- Highland Exhibition
- Electric Motor & Water Pump Repair and Replacement
- Healthcare Services
- Ticket Sales Marketing
- Lodging RFP
- Residential Laundry

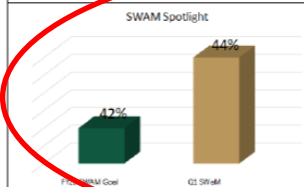
of the Month

lost an employee appreciation meal on-campus to celebrate our first half of the year. Is this an allowable purchase using my SPCC?

Answer: No, this meal must be processed through America To Go (ATG) since it is being held on campus. For more information, visit the [Food](#) section of [Buying@W&M](#). Also note that Employee appreciation events are only allowable using Local funds and are limited to no more than once per quarter.

Strategic Printing RFP— “Open Enrollment”

W&M will initiate the first open enrollment period for Strategic Printing Services beginning January 2020. If your department has a printer you would like to see added to the mandatory vendor pool, we encourage you to have them go to eVA: <https://bit.ly/2TRRP88> beginning January 2, 2020 and submit a proposal for consideration. Questions may be directed to Sherrene Moore, [s.moore@wm.edu](#)



SWaM Spotlight

In the first quarter of FY20, William & Mary made 44% of purchases from Small, Women-owned, and Minority-owned “SWaM” vendors. This puts William & Mary well on track to meet or exceed the total FY20 SWaM goal of 42%.

To learn more about SWaM Goals, including William & Mary's FY2020 SWaM procurement plan, visit [our website](#).

Reminders on Requests for Items Outside of TSRC

If you are looking for an office supply or furniture ~~related item~~ and have confirmed that TSRC does not carry and cannot sell the item(s) you are looking for, please complete the [TSRC Waiver Request](#). This process will provide W&M with a central location for the requests to allow for analysis of recurring requests to explore negotiating with TSRC to begin carrying. The form allows you to provide links and/or attachments for the items you are requesting a waiver for as well. Please note that we look to utilize TSRC for all office supply purchases for a multitude of reasons but most importantly because when we consolidate our buying power for the same types of purchases, there is significant savings and value added opportunities through the contract.

Let us hear from you! Do you have feedback on our newsletter, or other procurement related comments? Do you wish to see specific topics