

# Strategic Procurement Plan

Fiscal Year 2018—2022

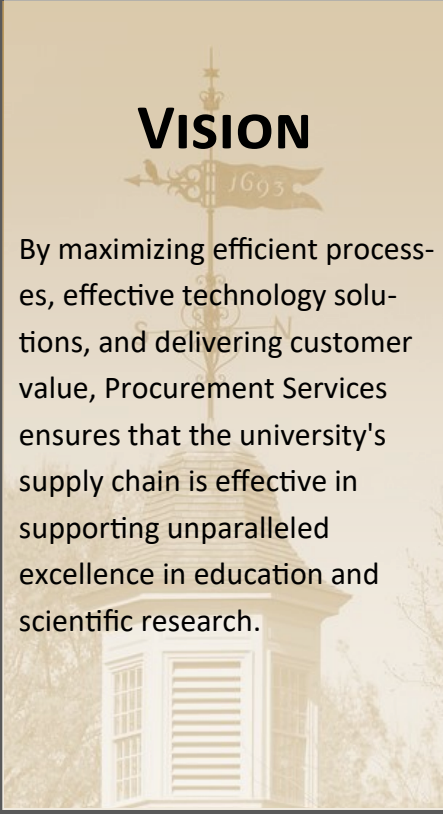
Updated for FY2021

## MISSION




Delivers procurement excellence for William & Mary through strategic thinking, supplier diversity, responsible stewardship and focused customer service.

## VISION



By maximizing efficient processes, effective technology solutions, and delivering customer value, Procurement Services ensures that the university's supply chain is effective in supporting unparalleled excellence in education and scientific research.

## 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.

### Value

*We will build knowledge, sharpen skills, foster curiosity, and leverage expertise to deliver meaningful outcomes and become a trusted advisor to campus for whole-university thinking.*

### Service

*All that we do will benefit the campus community, Commonwealth of Virginia, and the greater good.*

### Quality

*Adopt the university and National Association of Education Procurement (NAEP) Code of Ethics, and lead our campus community and suppliers with integrity to ensure a transparent, fair, and accountable process delivering innovative solutions and excellence, while allowing William & Mary to flourish.*





WILLIAM & MARY  
CHARTERED 1693

# Strategic Procurement Plan

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.



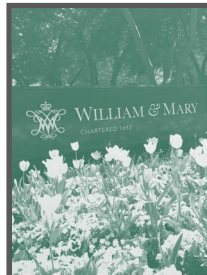
### **DYNAMIC TECHNOLOGY SOLUTIONS**

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**

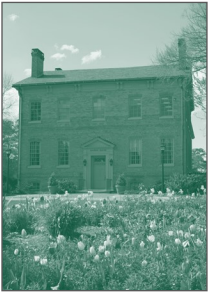
Provide best value contracts that deliver savings, introduce innovation, and support the campus community.



### **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.



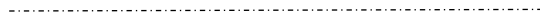


## Client Centric Procurement Support

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.



### Procurement Services will:

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

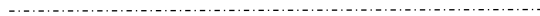
Deliver goods and services that meet the needs of campus clients and add value to the university.

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.



### In FY2021, our success will be measured by:

Expand engagement of the Procurement Advisory Council to enhance client support, review campus needs and partner on proposed changes, with targeted focus on P2P project.

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

Conduct a Spring 2021 client survey on campus satisfaction. Measure procurement performance; compare progress over time.

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, GovSpend, etc.).

Support staff expansion of skill sets that complement procurement functions.

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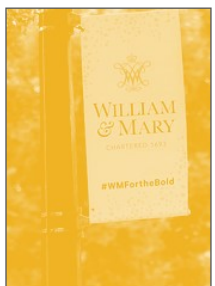
## In FY2021, our success will be measured by:

Maintain and enhance “on demand” training for campus, supporting 24/7 access to training materials.

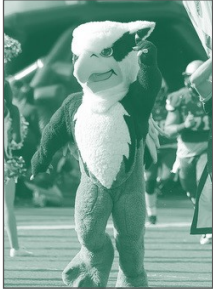
Update departmental project plan and leverage knowledge, skills and abilities of the team.

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

Procurement team members formally adopt and apply the NAEP Code of Ethics, and W&M Code of Ethics.



## 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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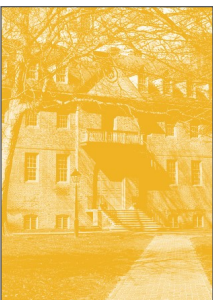
### In FY2021, our success will be measured by:

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

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. With implementation of new P2P system, expand sustainable practices in support of the university's goal for carbon neutrality by 2030.

Host one supplier event to promote campus engagement with diverse supplier base, and conduct at least 4 training sessions for external Suppliers.



## Promote Transparent Processes



Establish clear and accessible policies and procedures.

Communicate decentralized thresholds.

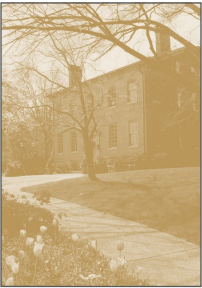
Participate in creation of a training curriculum for employees with fiscal responsibility.

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 FY2021, our success will be measured by:



Plan ways to use the new P2P system to populate procurement dashboard with less manual effort. Measure contract activity monthly by method of procurement and contract type (W&M, cooperative, GPO), and total spend under contract.

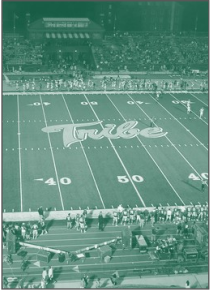
Communicate to internal clients the availability of newly established enterprise-wide contracts which will be published in the contract management system timely.

Monitor, maintain, and enhance the procure-to-pay matrix, updating to reflect P2P advancement.

Continuation of standardization efforts for key processes to facilitate consistent results for campus clients, through a Business Process Review, focus on preparation for new P2P system.

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.

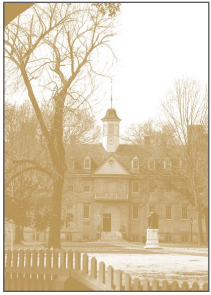
Enhance Supplier relationships.

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 FY2021, our success will be measured by:

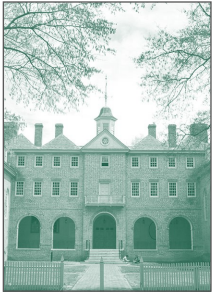


Implementation of dynamic source-to-settle software solution to improve client experience and improve campus process efficiency.

Maintain "forms" webpage for procurement on central finance forms page.

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

Improve signature authority protocol for campus, promote transparency.



## 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 FY2021, our success will be measured by:

Expand access to and aggregate data elements from different systems. Seek opportunities to integrate Robotic Process Automation/BOTS to reduce manual effort.

Begin transitions plan to move catering orders within the functionality of new P2P system, participate in VASCUPP re-solicitation, as needed. Support new program owner, share purchase data with appropriate offices, improve compliance among purchasers and suppliers.

Collaborate with budget department for proactive communication of ETF allocations and assist with configuration of new P2P process for budget checking.

Continue monitoring new Independent Contractor/Employee Classification process. Monitor outcomes to evaluate of proper classification of employee vs. IC, plan integration into P2P workflow.

