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

Procurement Services will maximize efficient processes and effective technology solutions, and deliver customer value. Procurement Services will work closely with campus clients departments to streamline the procure-to-pay process. Adopt stated elements of the W&M Promise: “Enhance efficiency and effectiveness of operations and identify opportunities for revenue generation or cost savings across the institution. Improve transparency of university revenue and expenditures across all sources and types of expenditures”.

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.
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.
Greetings College Community:

On behalf of Procurement Services, it is our pleasure to present this Five-Year Strategic Plan. The next five years will be transformational in the life of the College of William & Mary. In 2018 the university will recognize the 325th anniversary of the Institution and the retirement of our beloved 27th President, Taylor Reveley. Together we will celebrate the 50th anniversary of our first African American residential students, and welcome the 28th President of this esteemed College. Doors will open on a new Campus Wellness Center, a new Performing Arts Building, growth of William & Mary’s Virginia Institute of Marine Science campus, and many other exciting projects.

Despite the bright prospects for W&M, higher education in general continues to face external pressures of diminishing resources and increasing costs. Through innovation and best-in-class procurement practices, we will strive to deliver a competitive advantage to the university. Procurement Services will seek return on investment beyond simple cost efficiencies and deliver both financial value (cost savings realized by increasing spend under contract), and strategic value (improved transparency and awareness of expenses and enhanced relationships with key Suppliers). We must drive value, deliver quality, promote our services, and align with the university’s strategic plan.

As we move from planning to implementation, we look forward to positively influencing outcomes, supporting faculty, staff, students, alumni, business partners and community members, and advancing the principles of VALUE, SERVICE, and QUALITY.

Sincerely,

Erma A. Baker
Director of Procurement Services
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 AP 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 intended audience.

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 FY2019, our success will be measured by:

Re-evaluate client relationship management initiative, right-size the approach, consider qualitative impact, identify target CRM’s and liaisons, redefine steps in CRM process and expectations.

Customer satisfaction surveys, goal: 80% or better, satisfaction ratings.

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

Using the Spring 2018 client survey as a baseline measuring performance, resolicit feedback in Spring 2019 to monitor progress.

Using FY18 as baseline for decentralized findings of non-compliance, evaluate data, identify risk areas, target reduction in incidents through training and education.

Enhance user training for improved client experience.
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.

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, etc.).

Support staff expansion of skill sets that complement procurement functions.

In FY2019, our success will be measured by:

Continued use of current technology (Cornerstone) to plan and manage training and professional development, and to manage staff performance plans.

Update departmental project plan and leverage knowledge, skills and abilities of the team by providing challenging project opportunities for all team members.

Expand on standardization efforts for key processes to facilitate consistent results for campus clients.

Staff will maintain current certification levels and seek appropriate avenues to expand credentials/specialties.

Encourage online and on-site training to introduce appropriate tools and explore resources.

Procurement team members formally adopt and apply the NAEP Code of Ethics, and W&M Code of Ethics, each document will be reviewed annually.

Engage exercise to cross-train procurement teams at least once each semester.
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.

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”.

In FY2019, our success will be measured by:

Measure, monitor, and communicate savings targets and value-add outcomes, due to procurement involvement.

Report metrics to different audiences and stakeholders: client outreach, Digest, Newsletter, email.

Conduct at least 4 training sessions for external Suppliers.

Communicate to top administration the value of cooperative contracts: number of contracts / administrative savings / impact of cooperative contracts.

Track VHEPC impact to W&M using strategically sourced contracts: rebates, discounts, incentives. Achieve no less than 37% of SWaM/veteran owned (42% aspirational) spend goal for discretionary purchases.

Maximize opportunities for electronic workflow (DocuSign or similar), improve at least 3 existing forms / processes.

Identify key Stakeholder and Supplier engagement processes.

Streamline SWaM/Veteran-owned reporting and communicate SWaM/Veteran-owned utilization through CRM process.
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 College revenue and expenditures across all sources and types of expenditures.
Endorse open, fair, and ethical business processes.

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.

In FY2019, our success will be measured by:

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.
Introduce VHEPC initiatives during CRM meetings/trainings, share related information with entire campus at least once per quarter.
Monitor, maintain, and enhance the procure to pay matrix.
Refine use of the contract management system for increased efficiency.
Publish W&M contracts in the contract management system timely.
Continuation of a Business Process Review Team for continuous improvement.
Update continuity of operations plan “COOP” for procurement services.
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.

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.

Convert at least three (3) forms to electronic format for signatures.

In FY2019, our success will be measured by:

Explore opportunities to adopt and practice guided buying (ATG, Amazon Business, Jaggaer). Present management with a recommendation and ROI analysis for a dynamic source-to-settle software solution to improve client experience (ease of use, budget checks, accurate encumbrance management, access to contracts, robust reports).

At conclusion of each semester, measure number of web hits to procure to pay matrix to understand its value to campus (this has the potential to reduce process time).

Create a unified “forms” webpage for finance department.

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

Explore completion of two fully electronic contract record files, from solicitation to post-award activity.

Manage signature authority access and user profiles through technology.

Maximize eVA functionality where outcome is better, including greater visibility of data, or streamlining processes.

Work to expand system generated reports through Qlik.
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.

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.

In FY2019, our success will be measured by:

Share client specific analytics during CRM process once per year.
Expand the use of Banner to house procurement data from eVA and CMS including contract numbers, and 930 numbers, ETF data, etc., as IT can support.
Focus on improved reporting: monthly dashboard, quarterly spend by vendor and major category.
Use new catering solution to share purchase data with appropriate offices, improve compliance among purchasers and suppliers.
Manage a full year of vendor scorecard(s) for at least two of W&M’s strategic contract vendors.
Research new P2P software.
Collaborate with budget for trends and forecasting, including ETF allocations.