



WILLIAM & MARY

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PROCUREMENT SERVICES

March 2017

Welcome to Issue No. 6 of the Procurement Services quarterly newsletter! If you have questions about procurement or suggestions for future newsletter articles, you can submit them through the following link: <https://forms.wm.edu/23116> Enjoy reading and let us hear from you!

ANNOUNCEMENTS

Save the Date! William & Mary's 2017 Supplier Diversity Fair

Procurement Services will be hosting our 4th annual supplier diversity fair on Thursday, April 13, 2017 from 1pm - 4pm in the Campus Center's Trinkle Hall. This event allows for small, women, and minority-owned (SWaM) businesses to network with departments across campus to learn more about the university and purchasing needs. Last year's event resulted in almost 200 attendees and 45 exhibitors! Please help us make this year's event a great success as well. Questions about this event may be directed to Marra Austin at 757-221-7636 or by email at maaustin@wm.edu.

Regional Procurement Collaboration

William & Mary's Procurement Services hosted local procurement leaders for a regional collaboration event on March 28, 2017. Those in attendance included representatives from James City County, Gloucester County, York County, Colonial Williamsburg, and Christopher Newport University. Procurement officials from these local counties, city government and higher education institutions attended the



event to identify cooperative contracting opportunities within our region that will add collective benefit to all participating entities. The group identified several targeted contracts for early collaboration and will advance those plans in coming months. Please contact Erma Baker at 757-221-3954 or eabaker01@wm.edu for more information about this event or to discuss other collaboration opportunities.

Strategic Sourcing Update

Procurement Services has embraced the opportunity to partner with campus departments to establish contracts that realize cost savings, generate revenue in support of the university's general fund and improve William & Mary's business processes. Since the beginning of fiscal year 2016, Procurement Services has identified over \$1.2 million in revenue and cost savings from strategic sourcing, procurement and fixed assets operations. Thank you to everyone utilizing strategic sources to help ensure that William & Mary remains a financially healthy, well run institution for years to come. As a reminder, the university's preferred and mandatory suppliers may be found on the Procurement Services [Buying@W&M](#) web page. Please or contact Dave Zoll at 757-221-3953 or by email at djzoll@wm.edu with any sourcing questions you might have.



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Buying@W&M Update

This quarter's major addition to the [Buying@W&M](#) site has been provided by [Financial Operation's Tax Office](#).

The Tax Office, in conjunction with Procurement Services, is pleased to announce that Virginia Sales and Use Tax Exemption Forms for some of the most commonly used vendors are now available in Box through the [Buying@W&M](#)

website. Before requesting a tax exemption form from the ARMICS & Tax Compliance Officer, [Cindi Fellows](#), please check Box to see if a form is already available online.

Thank you to Cindi Fellows for bringing this information online!

Please complete our [Tribe Response form](#) or contact Dave Zoll at 757-221-3953 or by email at djzoll@wm.edu if you have any questions or suggestions for the [Buying@W&M](#) page.

▼ Tax and Tax Exemption

All tax questions and requests for certificates of tax exemption must be sent to William & Mary's ARMICS & Tax Compliance Officer, **Cindi L. Fellows**. Please include the vendor name and address with your request. Commonly used certificates of tax exemption are available in Box and may be found by clicking on the link below. Before requesting a tax exempt form, please be sure to check Box to see if a form is already available online.

- [Commonly Used Tax Exempt Forms](#) (Box login required)

As an institution of the Commonwealth of Virginia, William & Mary qualifies for retail sales and use tax exemption. Purchases of prepared foods, catering and related services provided in connection with the sale of food may qualify for tax exemption if the purchase meets the criteria outlined in Financial Operations' [Sales & Use Tax Update](#).



STAFF SPOTLIGHT

Sherrene Moore, Senior Procurement Officer

Sherrene came to William & Mary in August of 1988 as a Buyer for the university's Purchases & Store Warehouse and the copier program. Since then she has been the Buyer for each of the commodities identified in the procurement office at one time or another, but has maintained the copier commodity.

Prior to joining William & Mary, Sherrene worked as a Buyer at then Christopher Newport College for 3 years and previously as a Buyer of publications and college text books at a distribution company in New Hampshire.

Over the last year, Sherrene has been involved in the execution several contracts for the university, most recently Print Management Services awarded to ESI for copiers and printers with Hackworth subcontracting as William & Mary's Print Shop. She is currently working on two major projects for Uniform Rental Service and Temporary Employment Services. Meet the whole Procurement team by viewing our [Staff Directory](#) page!

VENDOR HIGHLIGHT

Procurement Services would like to thank those contract vendors who quickly responded to clean-up and repair our facilities after a fire occurred late last year in the William & Mary Law School. ServPro of Williamsburg assisted with wastewater clean-up through a newly awarded water removal contract put in place by Senior Procurement Officer, John Hornback. Demolition and renovation services were provided primarily by Air Clean Corp., Frank Contracting and Shalom Improvements through some of our 59 trades contracts put in place by Senior Procurement Officer, Kathy Mabe. Thank you to these essential SWaM businesses for their involvement in getting our facilities back up and running.



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QUICK TIPS

SPCC Reminders - Reconciliation and Business Meal Documentation

All transactions require a receipt or supporting documentation to be uploaded before signoff is completed (ex. detailed receipt, business justification, required travel documentation, IT approval, etc.). Cardholders and Approvers are responsible for ensuring that monthly reconciliation is completed by the 23rd of the month in which the cycle closes. All non-travel business meal purchases should have the [SPCC Business Meal Form](#) attached to the transaction in Works to ensure that the transaction contains all of the required documentation. All food purchases, even those from grocery stores, should have this form attached. Please see the [SPCC Policy and Procedures](#) for more on policies and procedures. Please contact Marra Austin at 757-221-3263 or maaustin@wm.edu with SPCC questions.

Revised Sole Source Form

Procurement Services has published a fully-electronic, revised sole source form containing modified questions. The revised sole source form may be found on [Procurement Services' Forms page](#). When submitting sole source documentation, please be sure to complete the correct version of the form to avoid delaying the procurement process.

UPCOMING DEADLINES

The closing schedule for Fiscal 2017 year-end has been published on the Financial Operations website. The linked page below contains dates and deadlines for Procurement Services and Financial Operations. <https://www.wm.edu/offices/financialoperations/announcements/fy17yearendclosing.php>

UPCOMING TRAINING SESSIONS

Procurement Services provides monthly training for employees. All training sessions will be held in the Procurement conference room unless otherwise noted. Please contact the Procurement representative listed to register for training. This quarter's sessions are listed below.

April 2017

- April 11, 9:00am – 11:00pm – SPCC Training (Marra Austin maaustin@wm.edu)
- April 20, 9:00am–11:00am – Procurement Process Training @ VIMS (Marra Austin maaustin@wm.edu)
- April 20, 9:00am – 11:00pm - eVA Training (John Dixon jadixon@wm.edu)

May 2017

- May 4, 9:00am –11:00am – Procurement Process Training (Marra Austin maaustin@wm.edu)
- May 9, 9:00am – 11:00pm – SPCC Training (Marra Austin maaustin@wm.edu)
- May 18, 9:00am – 11:00pm – eVA Training (John Dixon jadixon@wm.edu)

June 2017

- June 1, 9:00am – 11:00am – Procurement Process Training (Marra Austin maaustin@wm.edu)
- June 13, 9:00am – 11:00pm – SPCC Training (Marra Austin maaustin@wm.edu)
- June 15, 9:00am – 11:00pm – eVA Training (John Dixon jadixon@wm.edu)

We look forward to seeing you at William & Mary's 2017 Supplier Diversity Fair on April 13th from 1pm - 4pm!