



WILLIAM & MARY

CHARTERED 1693

OFFICE OF PROCUREMENT

November 2015

Welcome to Issue No. 1 of William & Mary's Office of Procurement quarterly newsletter! We'll be using this publication to keep you up to date on important changes to policies or procedures, new vendors on contract, tips and reminders and general items of interest. We have important things to share with you but, at the same time, we want to hear from you, too. 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> So, enjoy reading and let us hear from you!

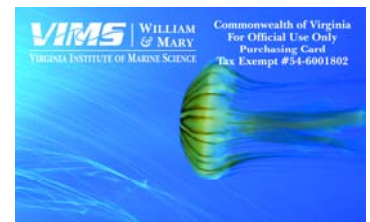
PROGRAM ANNOUNCEMENT

SPCC Card Changes

Procurement is excited to announce two upcoming changes to the small purchase charge card (SPCC) program. As with all US issuing banks, Bank of America is moving to chip and PIN technology for all cards. Implementation of chip and PIN cards is scheduled for December 2015, but exact dates have not yet been provided. Expect a follow-up communication from Procurement before the end of calendar year 2015.



Branded SPCCs have been designed for the William & Mary and VIMS card programs and will be rolled out toward the end of fiscal year 2016. Branded cards have been created to help everyone easily identify the correct card when making official business purchases. Please contact Dave Zoll (djzoll@wm.edu) if you have any questions on the new cards.



VENDOR HIGHLIGHT



SU Group

In the interest of cost savings, consolidation, and reduction in paperwork/administrative hours, we are partnering with Specialty Underwriters Group "SU Group", under E&I and DGS contracts, to manage equipment maintenance on electronic equipment. Since August 2014 we have saved over \$30,000 by moving Maintenance Service Agreements on 24 pieces of laboratory equipment/instruments at the William & Mary and VIMS campuses, to SU Group, with no reported problems or issues. Some of the benefits of using these contracts are:

- Significant hard dollar savings, 17-35%,
- One point of contact, reduced number of vendor contacts for maintenance services;
- The same manufacturer's representatives/technicians are providing the services;
- Agency reporting/customized online access to program materials, forms, real-time inventories & repair activity reports.

Please contact Cathy Hodock (cchodock@wm.edu) if you have any questions on the SU Group contract.

NEW PROCUREMENT CONTRACT

Constituent Relationship Management (CRM)

The enterprise CRM is an effort to consolidate the tracking and management of interactions with our many and varied constituents on a unified technology platform. It will not only provide targeted communications and personalized services to the greater university community but will bolster the recruitment and retention of talented students, improve efforts to engage and build loyalty with alumni and families, and provide opportunities for consistent and effective processes and data analytics. More information on the project can be found at <http://www.wm.edu/offices/it/services/projects/initiatives/crmproject/index.php>

STAFF HIGHLIGHT



Missy Zimmerman, PMP, CPCM

Pointing the way forward towards more strategic, cost saving approaches for procurement is Missy's primary responsibility. This includes data collection and analysis, research in procurement trends and techniques and working with statewide strategic sourcing initiatives. Before joining the Office of Procurement at W&M Missy spent 34 years with the Department of Defense in procurement and information technology projects devoted to supporting and improving procurement processes. Missy is a 1978 graduate of W&M. She returned to Williamsburg in 1996, is married to local small business owner Scott Zimmerman and happily spoils her four grandchildren whenever she can.

QUICK TIPS

Running Your Monthly SPCC Activity Report: The University has discontinued paper small purchase charge card (SPCC) statements. All cardholders and approvers will receive automated monthly reports 2-3 days after each billing cycle closes to take the place of paper statements. This report represents a snapshot of transaction information as of the date and time the report is run. If you need to run an updated copy of this report, you may do so by following the instructions provided on the [SPCC Training and Resources website](#). Please contact Dave Zoll (djzoll@wm.edu) if you have any questions on how to run a monthly report.

eVA Browser Cleanup: Procurement strongly suggests utilizing the Mozilla Firefox browser when accessing eVA. If Internet Explorer must be used, or if your eVA seems to be unresponsive while using Mozilla Firefox or Chrome browsers, it is best to perform a browser cleanup by following the instructions provided on the [eVA Frequently Asked Questions webpage](#). Additional information on optimizing your browser can be found at the following link: <https://eva.virginia.gov/pages/eva-optimizer.htm> Please contact Lynnette Jenkins (lhjenk@wm.edu) if you have any questions about eVA.

Clarifying eVA Purchase Order Category Codes: The PO category code "R02" is no longer an option. The commonly used codes are listed below:

- R01 – Use this code for all ROUTINE PO's that do not fall into the other categories below.
- S01 – Use this code for SOLE SOURCE PO's that have been approved as such by the Procurement Office.
- X02 – Use this code only for EXEMPT PO's when ordering goods and services on the eVA exclusions list.*

NOTE: EXEMPT PO's are not required to be entered in eVA. If you choose to do so, you MUST use X02.

SURPLUS ON HAND

William & Mary's Fixed Assets Management group oversees the university's surplus property inventory. This property is available for use by university departments. As of October 2015, there is a large amount of the following items in surplus inventory.

- Upholstered side chairs
- Fabric banquet chairs (green)
- Desk chairs
- Various sized tables
- Bookshelves

Please contact Debbie Acheson (djache@wm.edu) for more information on any of the items listed or to request a specific item from surplus. Debbie also maintains a furniture "wish list" which she will add you to if the item you request is not available.

UPCOMING DEADLINES

At the time of this publication, calendar year-end deadlines have not yet been established. Please look for a communication posted in the Digest regarding the closing schedule a little later on this year.

UPCOMING TRAINING SESSIONS

The Office of Procurement 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.

November 2015

- November 5, 9:00am-11:00am - Procurement Process Training (Marra Austin maaustin@wm.edu)
- November 10, 10:00am – 12:00pm – SPCC Training (Dave Zoll djzoll@wm.edu)
- November 19, 1:30pm – 3:30pm - eVA Training (Lynnette Jenkins lhjenk@wm.edu)

December 2015

- December 3, 9:00am-11:00am - Procurement Process Training (Marra Austin maaustin@wm.edu)
- December 8, 10:00am – 12:00pm – SPCC Training (Dave Zoll djzoll@wm.edu)
- December 17, 1:30pm – 3:30pm - eVA Training (Lynnette Jenkins lhjenk@wm.edu)

January 2016

- January 7, 9:00am-11:00am - Procurement Process Training (Marra Austin maaustin@wm.edu)
- January 12, 10:00am – 12:00pm – SPCC Training (Dave Zoll djzoll@wm.edu)
- January 21, 1:30pm – 3:30pm - eVA Training (Lynnette Jenkins lhjenk@wm.edu)

VIMS SCHEDULE

A representative from Procurement is available in the Sowers House on the VIMS campus every Tuesday. Below is the most current schedule of the representatives on rotation. This schedule is subject to change. Those interested in meeting with a Procurement representative are encouraged to schedule the meeting in advance or call the Sowers House at (804) 684-7868.

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| • October 27, 2015 | Dave Zoll |
| • November 3, 2015 | John Hornback |
| • November 10, 2015 | Sherrene Moore |
| • November 17, 2015 | Lynnette Jenkins |
| • November 24, 2015 | Cathy Hodock |
| • December 1, 2015 | Kathy Mabe |
| • December 8, 2015 | John Hornback |
| • December 15, 2015 | Dave Zoll |
| • December 22, 2015 | Lynnette Jenkins |
| • January 5, 2015 | Cathy Hodock |
| • January 12, 2015 | Sherrene Moore |
| • January 19, 2015 | Kathy Mabe |

