



WILLIAM & MARY

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OFFICE OF PROCUREMENT

December 2016

Welcome to Issue 5 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. 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>

ANNOUNCEMENTS

Erma Baker, Director of Procurement



Before joining William & Mary, Erma worked at her alma mater, the University of Mary Washington for 26 years, most recently as the Assistant Vice President for Business Services and Chief Procurement Officer. She is excited about the opportunity to work at William & Mary (her Father's alma mater), and lead a dynamic procurement team. Erma and her husband Brian have two daughters, Libby, 28, graduated from RMWC, and received her MBA from UMW, lives in Fredericksburg and is getting married in April 2017. Mary Wallace "Wally", 18, a senior in high school, planning to attend ODU in the Fall and play field hockey (despite two season ending injuries...read: long journey!). Erma enjoys family time, reading and gardening. Meet the whole Procurement team by viewing our [Staff Directory](#) page!

Buying@W&M Update

As a result of feedback received at the VIMS Administrative Forum, a Vehicles commodity group has been added to the [Buying@W&M](#) page. This section provides guidance on purchasing vehicles and lists Advance, Carquest and O'Reilly as strategic sources for the purchase of automotive parts. Please view the Vehicles section of [Buying@W&M](#) for account numbers to reference when placing orders with these vendors.

Buying@W&M

Amtek Company, Inc. provides solutions and services related to 3D printing and digital fabrication. This vendor has been added to the Lab and Scientific Equipment and Supplies section of the [Buying@W&M](#) page. Amtek is a [Small Business and Supplier Diversity \(SBSD\)](#) certified, small business and strategic contract source of the Virginia Higher Education Procurement Cooperative (VHEPC).

VHEPC has awarded a contract for lab supplies to Eppendorf. Projected contract savings are estimated at 10% over other distributors. For more information on this contract or to see other vendors under contract, please view the [Laboratory & Scientific Equipment and Supplies Guide](#).

A Tax and Tax Exemption category group has been added to the [Buying@W&M](#) page to identify the point of contact for tax related questions and requests for certificates of tax exemption. Procurement will be working with Financial Operations' Tax Office to place pre-populated certificates for frequently requested vendors in a Box folder for easy access. More information on this project will be provided as forms are added to the Box folder.

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

VENDOR HIGHLIGHT



In Fall 2014, the Merchandising Working Group identified the need to better market William & Mary licensed products on a larger stage and identified [Collegiate Licensing Company](#) (CLC) as the partner to assist with that effort. William & Mary has been working with CLC through a VASCUPP agreement since July 2015 and has seen the Licensing program grow steadily in both royalties collected and vendors licensed to produce William & Mary product. Working with Licensing is an important component of using the William & Mary brand as it ensures that the mark is used correctly and consistently and follows the [William & Mary Style Guide](#). Licensed vendors have access to official artwork and are required to submit art for approval prior to production.

Art approvals typically do not take any additional time and require no additional steps on behalf of the client.

Items that are produced for resale are subject to a 10% royalty on the wholesale cost (If you purchase a shirt for \$5 and plan to resell it for \$10, \$.50 will be due) however, items produced for internal purposes (uniforms, equipment, etc.) and giveaways are not subject to royalties. Royalties are paid by the vendor and not you as the customer.

For a full list of licensees and additional information, please visit www.wm.edu/licensing Questions? Contact licensing@wm.edu or Eden Harris at 757-221-4821.

STAFF SPOTLIGHT

New e-Procurement Officer

Please help us welcome John Dixon to Procurement! John joins William & Mary's Office of Procurement after working with Newport News Shipbuilding for the past 7 years. John grew up in Newport News, but now lives in Williamsburg with his wife and two children. He enjoys quality family time, travelling, visiting new breweries, and playing the guitar. John will be your new point of contact for eVA questions, requests and training. Please feel free to contact him by phone at 757-221-3957 or email at jadixon@wm.edu.



QUICK TIPS

Two Questions to Ask Before Making Your Next Purchase

When placing orders, you have tremendous control over the cost of products and the vendors receiving the university's business. Cost savings, cost avoidance and strategic vendor utilization start with you! Before placing your next order, ask yourself: "Am I using the right vendor?" and "Am I getting the best value?"

Do you need help finding a vendor? Procurement has developed the [Buying@W&M](#) webpage to simplify purchasing at William & Mary by aggregating strategic vendor and contract information in one place. The site lists preferred and mandatory suppliers and should help you identify vendors in some of the most common commodity areas. Please complete our [Tribe Response form](#) located on the [Buying@W&M](#) page if you would like to see a commodity area or vendor added to the page.

If you are simply duplicating past orders for office supplies and other goods, it's possible that you are not getting the best value on your order. Contracts renew and the price of items under contract fluctuate. Before checking out with your next order, take a moment to review pricing on comparable products. Please remember to contact a Procurement Officer through our [Staff Directory](#) to see if volume discounts are available for large quantity orders. Finally, don't forget to ask for best and final pricing when vendors are quoting delegated authority orders. Asking "Is this the best pricing you can offer us?" can often yield great results.

If you have any questions about the information above or suggestions for the [Buying@W&M](#) page contact Dave Zoll at 757-221-3953 or by email at djzoll@wm.edu.

Auto Populating Your eVA Purchase Requisition

Procurement recently discovered the capability of auto populating an eVA Purchase Requisition utilizing a vendor's issued quote and their Punchout catalog. The requisitioner is able to perform this functionality by entering the issued quote number into the vendor's Punchout catalog which will pull in all applicable items into their shopping cart. The requisitioner then will checkout from the Punchout resulting in those items to be brought into their eVA Purchase Requisition. Known vendors that have this capability are Fisher Scientific, VWR, Dell, and Grainger. More information will be made available soon on Procurement's website. Please contact John Dixon at 757-221-3957 or by email at jadixon@wm.edu.

eVA Vendor Update

Procurement would like to thank everyone for the recent changes to the vendor create process. While the process does require a bit of advance planning given the time it takes to get the vendors created, we hope you all are seeing a more efficient posting of the Banner encumbrances given the vendor creation is initiated earlier. A few tips to keep in mind when sending state-entered procurement vendor requests:

- Send the W-9 as a separate document and one per creation
 - Please do not send multiple W-9s in one file - we will send back and ask for the files to be separated.
 - Please do not include any other information in the file – no invoice, contract, etc.
- Review W-9/W-8 before submission – things to look for:
 - Complete and legible
 - All nine digits for EIN/SSN
 - Signed – electronic signatures are not accepted
 - A contact name listed



Please send procurement vendor create requests or inquiries to evavendor@wm.edu. Fiscal vendors (eVA exempt transactions) should be sent to apvendors@wm.edu.

UPCOMING DEADLINES

Calendar year-end deadlines have been established by Financial Operations and may be found on their [December 2016 Closing Instructions announcement](#).

Please note that there is no change to the monthly timeline for SPCC reconciliation. Transactions for the cycle ending December 15, 2016 must be reconciled prior to December 24th.

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.

January 2017

- January 5, 9:00am-11:00am - Procurement Process Training (Marra Austin maaustin@wm.edu)
- January 10, 9:00am – 11:00pm – SPCC Training (Liz Gentry megentry@wm.edu)
- January 19, 9:00am – 11:00pm - eVA Training (John Dixon jadixon@wm.edu)

February 2017

- February 2, 9:00am-11:00am - Procurement Process Training (Marra Austin maaustin@wm.edu)
- February 14, 9:00am – 11:00pm – SPCC Training (Liz Gentry megentry@wm.edu)
- February 16, 9:00am – 11:00pm - eVA Training (John Dixon jadixon@wm.edu)