



WILLIAM & MARY PROCUREMENT SERVICES

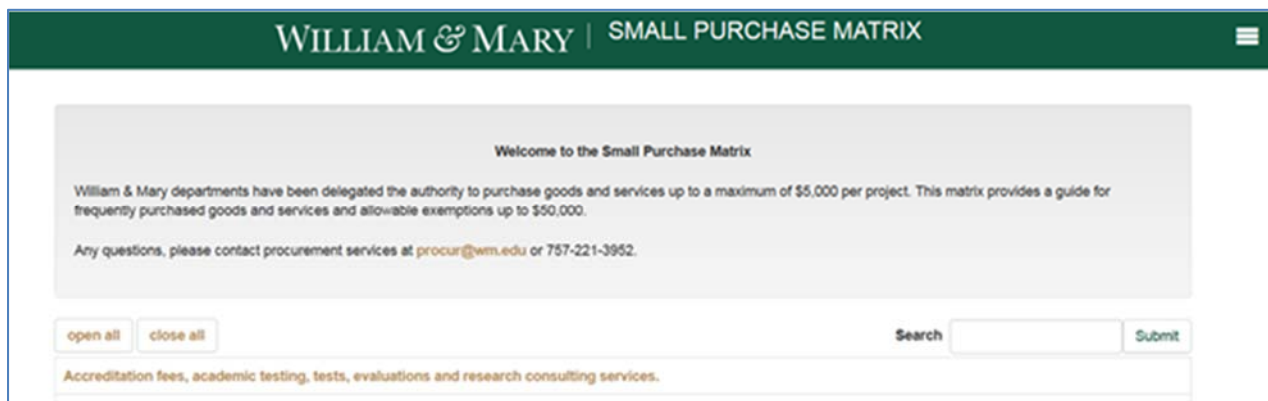
September 2017

Welcome to Issue No. 8 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

Buying@W&M Update - Procure-to-Pay Matrix and Small Purchase Procedures

In conjunction with the publication of William & Mary’s Small Purchase Procedures, the offices of Procurement Services, Accounts Payable, and Information Technology, have collaborated on the creation of a procure-to-pay matrix.



This matrix is structured to be a “one stop shop” to help end users walk through the procure-to-pay process for frequently utilized goods and services. Each commodity and procurement type listed will provide instructions on what is allowed under the Small Purchase Charge Card, eVA and competition exemptions, contract information, applicable forms, and related expenditure codes to complete payments.

Lab and Scientific Equipment and Supplies									
Commodity / Procurement Type	SPCC Transactions under \$5000	eVA Exempt	Competition Exempt	Funding Source	Contract	Approval Needed	Owning Dept	Form Link	Expenditure Codes
Lab and Scientific Equipment and Supplies	Yes	No	No	State or Local	Lab & Scientific Equipment/Supplies Sources	Authorized Approver	N/A		713410 722410

Please use this matrix by visiting [/procuretopay.wm.edu](http://procuretopay.wm.edu) and any feedback is always encouraged. Special thanks to Scott Hayes, Jason Pulley, Ruth Gilliam, Amber Brown for design, and execution of this new tool. Please contact John Dixon at 757-221-3957 or by email at jadixon@wm.edu if you have any questions about the Procure-to-Pay Matrix.

Policy Reminders - Wireless Communications and Licensed Products

Please be advised that the university’s Wireless Communications Policy and Procedures have been revised. Updated policy and procedures may be accessed through the following link: [Wireless Communications Policy and Procedures](#).

As a reminder, when ordering products that include the William & Mary name or logo, the use of a licensed vendor is required regardless of funding source or payment type. A database of approved vendors is available at www.wm.edu/licensing and questions may be sent to licensing@wm.edu.



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Local Funds Policy Update

Local funds are university-controlled funds that are not appropriated by the state or revenue derived from student fees. The new policy allows additional expenses to be covered by Local funds that cannot be paid for using State funds, within policy limits. Please note that all items purchased, regardless of funding type, must comply with Procurement Policies and Procedures. Refer to the Small Purchase Matrix referenced above on the funding source allowable for various commodities.

Supplier Diversity Lunch & Learn

On August 25, the Office of Diversity and Equal Opportunity sponsored a "lunch and learn" for Procurement Services: 'Supplier Diversity at W&M'. The session, hosted by Staci Longest and Marra Austin, included the topics:

- Top 3 reasons why supplier diversity is important.
- How to search for small, women-, and minority-owned (SWaM) businesses.
- Looking within the university at the current status of supplier diversity efforts.
- Updates on Virginia's requirements and definitions of reportable suppliers.

There was also a collaborative aspect in which the groups discussed ideas on how to improve utilization of SWaM businesses. Interested in learning more? Check out the Office of Diversity & Equal Opportunity's Facebook page to see the [videos](#) of the session and be sure to follow their page. A special thank you to the Office of Diversity & Equal Opportunity for allowing Procurement Services the opportunity to reach colleagues across campus and the educational opportunity to learn more about supplier diversity.



Procurement's New DocuSign Forms

Procurement Services has started to utilize DocuSign technology to help streamline and automate forms requiring signatures. DocuSign is a tool that provides electronic signatures and work flows for documents. The use of this technology has been successful thanks to the help of IT's James Strawn (or Superman as he is referred to in Procurement) and his work in transitioning the previous paper based sole source form into an electronic workflow. This new process has a significant impact on turnaround time for approvals on sole source procurements along with having cost savings. The Small Purchase Charge Card and eVA user applications are currently being tested and should be in production by the second quarter of FY18.

Specialty Underwriters (SU Group) Open House

Ty Demuth from the SU Group will be at Procurement Services on October 17th from 1:00 - 2:00 PM and at VIMS on October 18th at the Chesapeake Bay Hall (CBH) 3rd Floor Conference Room (L302) from 9:00 - 11:00 AM. If you would like an invite, please email wavega@wm.edu. SU offers a flexible and comprehensive equipment maintenance management program (EMMP). Throughout the year, departments will receive maintenance agreement requests that are initiated based on expiring renewals or new equipment warranties. With SU, departments are able to take advantage of cost reductions and flexibility.



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NEW PROCUREMENT CONTRACTS

Event Rental - Procurement Services is pleased to bring five new SWaM certified, event rental vendors on contract. Magic Event Rentals, Sharpe Pursuits, Special Events Entertainment, US Event Structures, and Williamsburg Event Rentals are now available to provide rental products for special events of any cost and size. Thanks are extended to those in Advancement, Athletics, Facilities Management, and University Events for their help in this process. Vendor contact information and a Special Event Pricing Matrix may be found in the Event Rental section of the [Buying@W&M](#) web page. Please direct event rental questions to John Hornback at 757-221-1579 or by email at jhornback@wm.edu.

STAFF SPOTLIGHT

Erin Moskalski, Operations Support Assistant



Erin joins William & Mary Procurement Services as the Operations Support Assistant after working as the marketing coordinator at Criner Remodeling from 2015 to 2017 and as the marketing specialist at New Kent Winery for the five years prior. Originally from Virginia Beach, Erin now lives in West Point with her husband Travis and their two young daughters. A graduate of Christopher Newport University, Erin enjoys movies and local events. Erin will be involved in daily operations, oversight of the contract management system, website updates, surveys, reporting, and document management. She will also be your first point of contact when visiting the Procurement Services office. Please contact Erin by phone at (757) 221-3952 or email ewmoskalski@wm.edu. Meet the whole Procurement team by viewing our [Staff Directory](#) page!

QUICK TIPS

SPCC Reminders - New Works General Ledger Segment and Duplicating Line Items

To improve expenditure reporting, Procurement Services has added a new general ledger segment to the allocation settings in Works. You may have already noticed the GL05: Contract field while performing reconciliation. This field is utilized by Procurement Services to determine monthly and annual contract activity. This field is set to automatically populate for several of our strategic sources and requires no additional action on your part. Like the GL04: Activity field, it is not mandatory to enter a value in the GL05: Contract field. The GL05: Contract information is currently for internal reporting purposes only, but may eventually be passed along to Banner for even greater visibility of contract purchases.



As a reminder, when performing multiple line item allocation, it is best to use the Duplicate option. This option will replicate the transaction's description and GL values on new lines. This option is preferred to the Add option which simply inserts a blank line that must then be manually keyed. Please see the [SPCC Policy and Procedures](#) for more on policies and procedures. Contact Laken Marley at 757-221-2513 or lmalley@wm.edu with SPCC questions.



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UPCOMING DEADLINES

Please note that there are no changes to the monthly timeline for November or December SPCC reconciliation. As with all months, transactions must be reconciled prior to the 24th of the month.

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 log into [Cornerstone](#) to register for the session(s) you are interested in attending, from the home page, please enter “Proc” in the search bar for a listing of Procurement Service’s trainings. This quarter’s sessions are listed below. Please contact procur@wm.edu with any questions.

October 2017

- October 10, 9:00am – 11:00pm – SPCC Training
- October 19, 9:00am – 11:00pm - eVA Training

November 2017

- November 2, 9:00am – 11:00am – Procurement Processes Training
- November 14, 9:00am – 11:00pm – SPCC Training
- November 16, 9:00am – 11:00pm – eVA Training

December 2017

- December 7, 9:00am – 11:00am – Procurement Processes Training
- December 12, 9:00am – 11:00pm – SPCC Training
- December 21, 9:00am – 11:00pm – eVA Training