



WILLIAM & MARY  
PROCUREMENT SERVICES  
Annual Report FY19

Value  
Service  
Quality

# Table of Contents

Procurement Priorities....	2
Procurement by the Numbers.....	3
Small Purchase Impact....	4
Supplier Diversity .....	5
University Top Spend by Category .....	6
The People Behind Procurement.....	7
Dedicated to Service .....	8
Procurement and Campus.....	10
Demonstrating Value & Service.....	12
Process Improvements...	13
Noteworthy FY19 Contracts.....	15
Future Goals.....	16



## Mission Statement

*The mission of Procurement Services is to support W&M as a leader among liberal arts and sciences 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 process while maintaining University compliance, with attention to corporate social responsibility both within the institution and among its Suppliers.*



# Procurement Priorities

## **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.

The 2018-2022 Procurement Strategic Plan may be accessed on the [procurement website](#).

# Procurement by the Numbers - FY19

## Contracts (excluding construction)

Over  
**\$80,000,000**

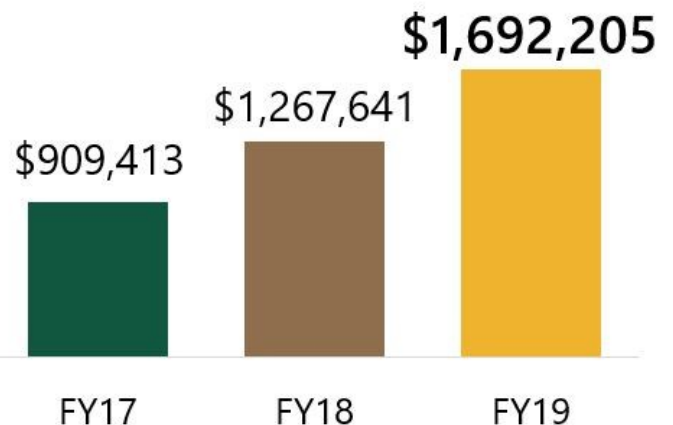
Spend through active contracts

**312**

contracts completed



## Cost Avoidance , Savings, & Revenue



## Feedback Ratings

**93%**

Post-solicitation  
survey overall rating

**96%**

SPCC and eVA  
training overall rating

**82%**

of campus clients had  
good or excellent  
experiences with  
Procurement

# 26

Formal solicitations  
(>\$100k) issued

# 8,264

Active vendors

# 522

Active contracts (W&M and cooperative)

# 96%

Of spend is distributed among  
top 20% of suppliers

# 163

Contract renewals completed

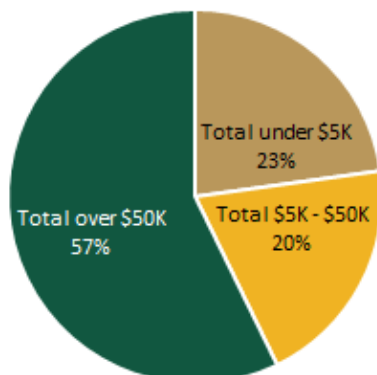
# 3,842

Views of P2P Matrix

## Small Purchase Impact (excluding construction)

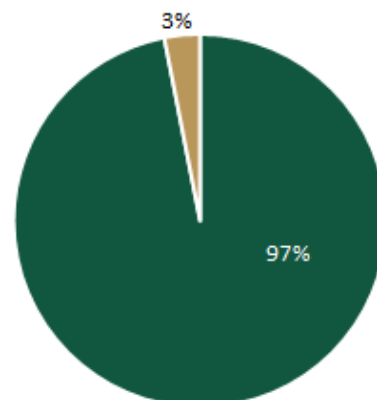
	\$ Amount	# Transactions
Total under \$5K	\$26,742,925	64,949
Total \$5K - \$50K	\$23,441,614	1,694
Total over \$50K	\$67,113,253	377

FY19 Transactions by Dollars



■ Total under \$5K ■ Total \$5K - \$50K ■ Total over \$50K

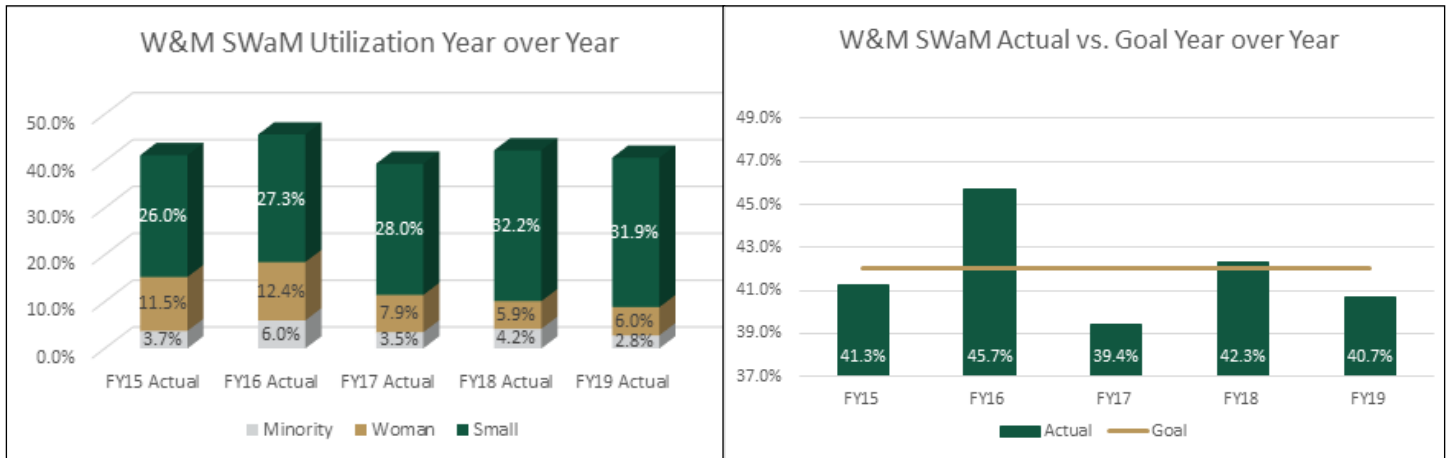
FY19 Number of Transactions



■ Under \$5K ■ Over \$5K

## Supplier Diversity

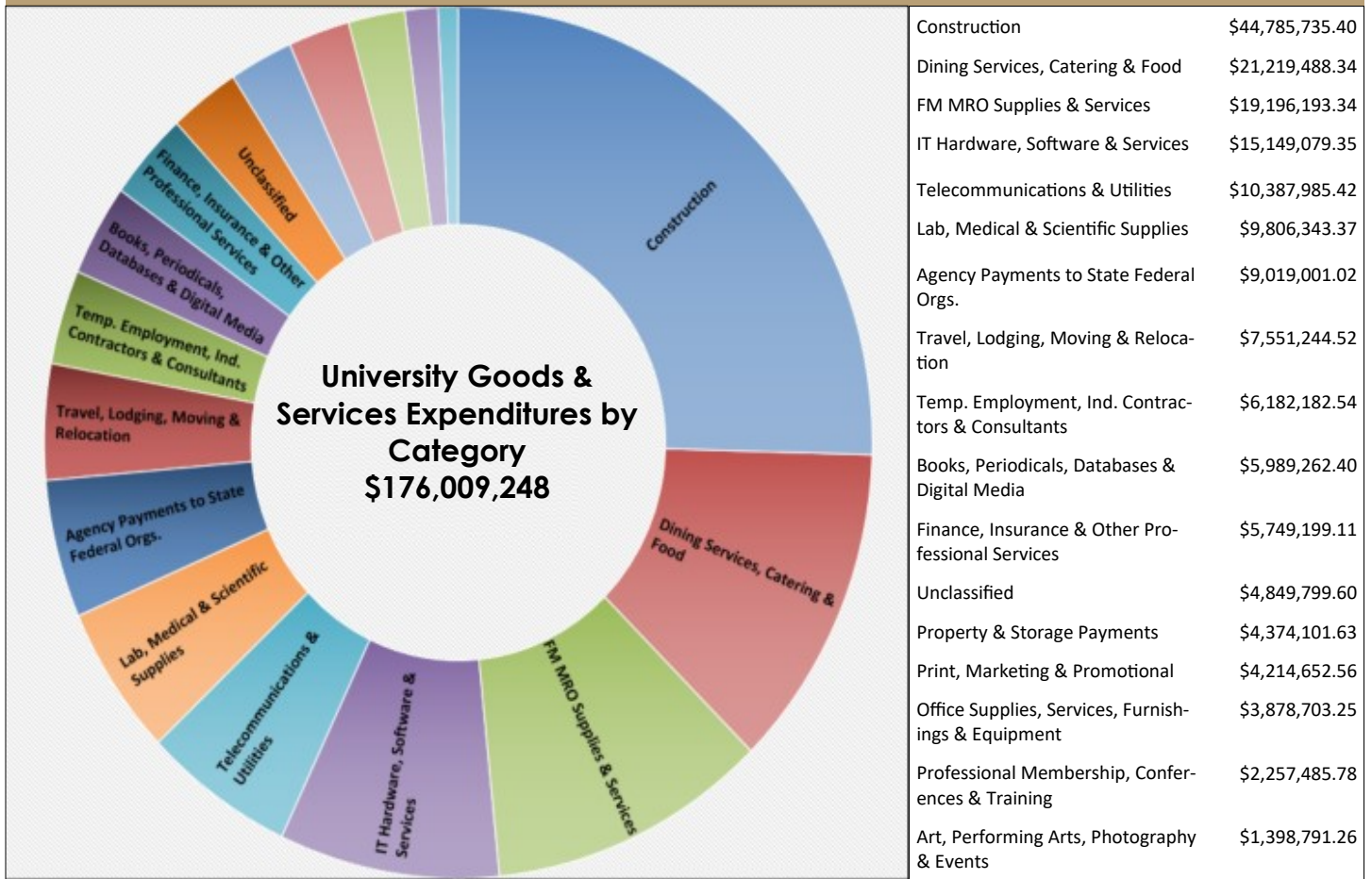
To encourage and foster supplier diversity, the University has a 42% of discretionary expenditure goal for the utilization of small, woman-owned, and minority-owned “SWaM” suppliers. The following tables show the year-over year breakout per category.



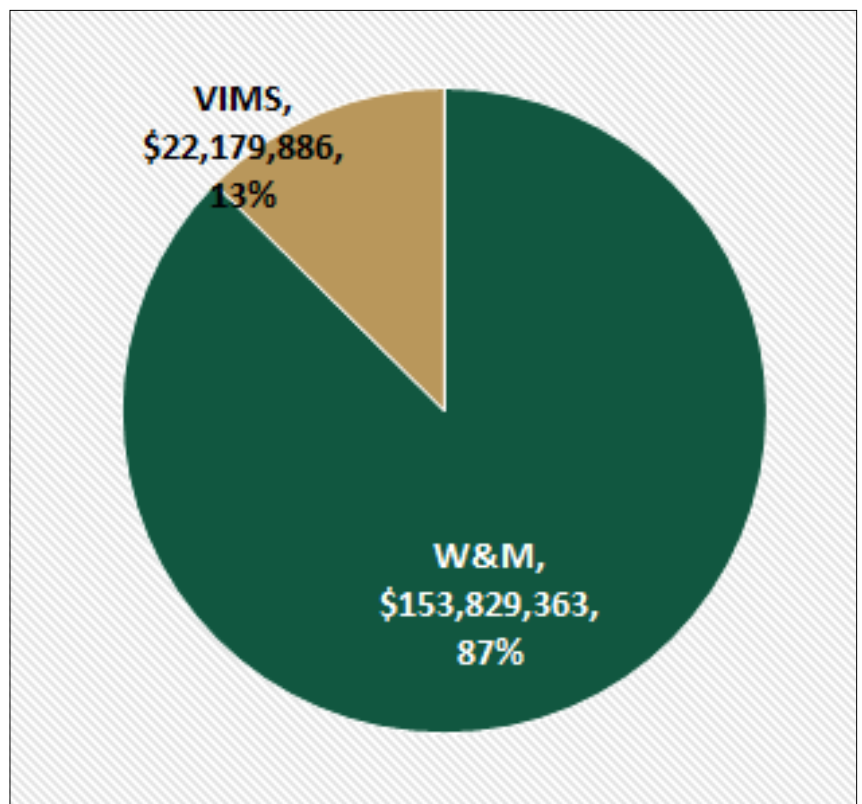
### W&M Procurement Services encouraged utilization of SWaM business in the following ways:

- ◆ Hosted an annual supplier diversity event to afford campus opportunity to learn and network with SWaM suppliers—April 11, 2019.
- ◆ Active participant in SWaMfest, October 2018. The largest supplier diversity event in Virginia. W&M participated in the supplier showcase, engaged in classes and networking opportunities, and participated in VASCUPP panel.
- ◆ Introduced W&M SWaM businesses to campus business managers during semi-annual P2P Open Forum events. Share SWaM goals and progress toward goals.
- ◆ As possible, expanded the contract base with SWaM suppliers. As an example in FY19, a strategic print contract was awarded to nine suppliers (included seven SWaM options for campus).
- ◆ Procurement Services delivered quarterly Supplier training discussing eVA, SWaM, W&M, & more. Most attendees were SWaM eligible.
- ◆ Expanded SWaM options within the America To Go catering portal.
- ◆ All requests for proposals included SWaM utilization as a criteria for consideration.
- ◆ Completed and published annual Commonwealth report template “SWaM Plan”.

# University Top Spend By Category



Top 10 Suppliers (Total Spend)	Total
Sodexo Inc	\$18,627,535.32
DPR Construction A General Partnership	\$7,541,858.83
Dominion Energy Virginia	\$6,203,044.97
W M Jordan Company Inc	\$5,305,387.82
Holder Construction Group LLC	\$5,035,290.52
Moseley Architects	\$4,456,612.23
The Whiting-Turner Contracting Company	\$4,154,725.74
United Healthcare Insurance Company	\$3,518,447.00
Meridien Maritime Réparation (6818703 Canada Inc)	\$3,488,561.82
Kjellstrom and Lee, Inc	\$3,377,534.76







Procurement Team during the FY20 planning retreat.

## The People Behind Procurement

### *Meet your FY19 Procurement Tribe.*

#### **Staci Longest, Associate Director - Procurement Operations**

CUPO, CFE, MSA

#### **Rebecca Kinkead, Senior Sourcing Specialist**

CUPO, CPSM, C.P.M.

#### **Sherrene Moore, Senior Sourcing Specialist**

CUPO, VCO

#### **John Dixon, Procurement Systems Specialist**

#### **Dave Zoll, Sourcing Analyst**

CPCP, VCA

#### **Erma Baker, Director**

CPPO, VCCO, CUPO, VCM, VCO

#### **Marra Austin, Associate Director - Procurement Processes**

CUPO, VCO

#### **Kathy Mabe, Senior Sourcing Specialist**

CUPO, VCO

#### **Bill Vega, Senior Sourcing Specialist**

CUPO

#### **Laken Marley, SPCC Program Administrator**

#### **Erin Moskalski, Operations Support Assistant**



# Dedicated to Service

Senior Sourcing Specialist  
**Sherrene Moore** was  
selected for the **2019**  
**Charles and Virginia Duke**

**Award**, which recognizes outstanding employees for exemplary individual accomplishments in their professional lives and service to the William & Mary community. Sherrene has worked in Procurement Services since 1988, and her dedication, service, and outreach has distinguished her as an invaluable member of the W&M Tribe. An award ceremony took place on April 29th in the Wren Great Hall, and the official recognition of this award took place at Commencement on May 11, 2019.

***Congratulations to Sherrene for receiving this prestigious award!***



# Dedicated to Service



Senior Sourcing Specialist Kathy Mabe was honored during the VIMS 2019 Service Awards for 25 years of service.

Dave Zoll received an award for 5 years of service to W&M. Dave has dedicated a total of 14 years to the Commonwealth.



Bill Vega was recognized for serving in Procurement Services as a Senior Sourcing Specialist for 5 years.

The Office of Diversity and Inclusion recognized Marra Austin for her commitment and leadership in expanding W&M's supplier diversity.



# Procurement & Campus

## Procure-to-Pay Forum

In October and February, Procurement Services cohosted “P2P” forums explaining new and important buying-related topics. Over 100 guests attended in-person at each event, with dozens more watching online. Following each forum, guests were invited to attend a menu tasting event by our contracted supplier America To Go “ATG”, getting a chance to meet ATG vendors and sample from their menus.



## Supplier Diversity Fair

Procurement held the 6th annual Supplier Diversity Fair, which allowed departments across the W&M and VIMS campuses to network with small, women, and minority-owned (SWaM) businesses to discuss upcoming projects, strengthen existing relationships and learn more about the university's purchasing needs. The attending suppliers account for more than \$3 million in annual business for W&M.



## TSRC Open House

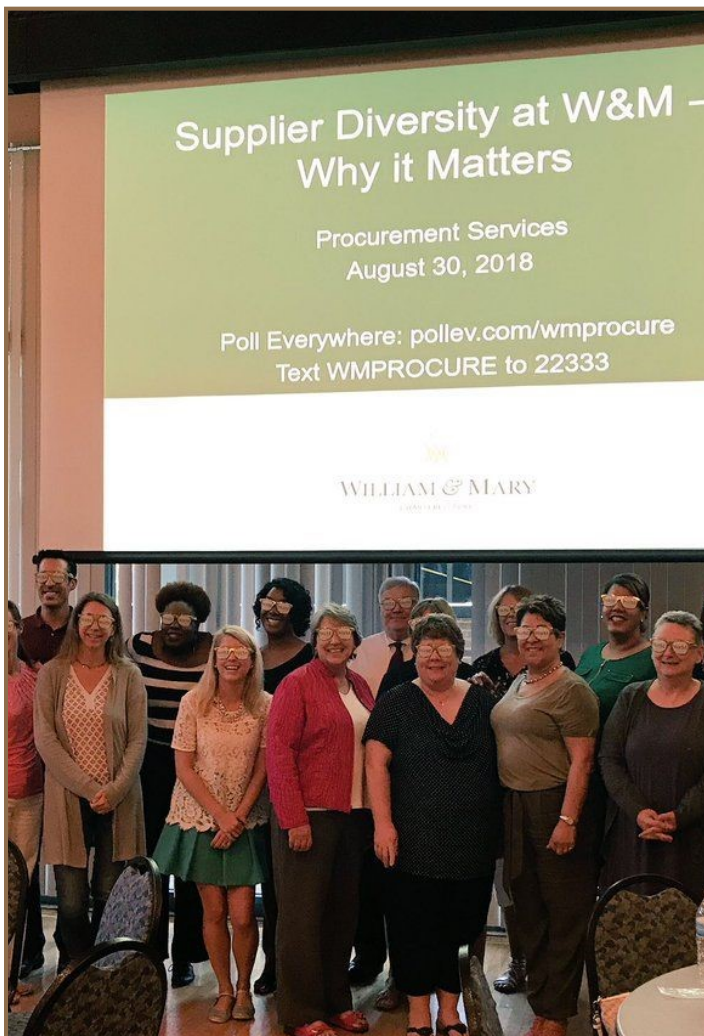
In the spring, Procurement collaborated with TSRC (The Supply Room Company), Quartet, Post-It, and Fellows to host open houses at VIMS and W&M in order to inform and connect with campus clients.





# Diversity & Inclusion Lunch & Learn

For the second year in a row, Marra Austin and Bill Vega presented on Supplier Diversity at W&M, during the Office of Diversity & Inclusion's Lunch and Learn. Topics included how to find SWaM vendors with W&M contracts, increasing supplier diversity at W&M, and providing potential opportunities to local businesses through education and outreach facilitated by Procurement Services.



# Campus Involvement

*Procurement involvement extends across campus and beyond our campus walls.*

Marra Austin—Member of the W&M Professionals & Professional Faculty Assembly (PPFA)

Bill Vega—Sponsorship Implementation Committee

John Dixon—Member of Staff Assembly

Laken Marley—Staff Appreciation

Supplier Diversity Fair—The Annual W&M Supplier Diversity Fair hosts more than 45 SWaM suppliers who deliver more than \$3 million in goods/services annually.

Quarterly Supplier Training—In collaboration with eVA, this training serves to introduce tools and tips of doing business with Virginia, followed by a W&M orientation.

Virginia Association of State College and University Purchasing Professionals :

Erma Baker—Board of Directors, VP

Marra Austin— Cooperative Contracts Committee

Laken Marley—Supplier Diversity Committee

# Demonstrating Value & Service

## Achievement of Excellence in Procurement Award from the National Procurement Institute

In FY19, Procurement Services received the Achievement of Excellence in Procurement Award from the National Procurement Institute. The award is presented annually to organizations that demonstrate excellence in innovation, professionalism, productivity, e-procurement and leadership. There were 202 successful recipients total, 25 within Higher Education.



## 2018 SWaMfest Panel

SWaMfest is the largest annual supplier diversity event in Virginia. Erma Baker served on a panel with other Virginia Association of State and College University Procurement Professionals (VASCUPP) directors from JMU and VMI to discuss the value of VASCUPP and how small businesses can use opportunities to participate in state business.

## VASCUPP Education Conference

Staci Longest served as an instructor in the 2018 VASCUPP Education Conference. She, along with other members of VASCUPP, instructed new and veteran higher education buyers on VASCUPP laws, policies, and procedures.

## Presentations on Campus Food Infrastructure

In addition to delivering over 100 on-campus presentations and trainings on America To Go catering program, Dave Zoll presented regionally on the topic of Change Management at the Virginia Higher Education Procurement Consortium (VHPEC) Data Analyst Group and at the National Association of College Auxiliary Services (NACAS) conference.

## Bank of America Card Summit

Laken Marley and Dave Zoll represented W&M at the 10th Annual Bank of America Card Summit on March 21 in Richmond. They presented to 300 card administrators from agencies across the Commonwealth, discussing how W&M's small purchase charge card program has evolved over the past several years.

# Process Improvements

"ATG has created an amazing amount of efficiency for the Business School – not only do you see all of your options on one screen, the user has the ability to filter on location, date, time to the event and even dietary restrictions. With ATG we are saving 150 man hours per year just on processing alone. This doesn't count the time saved by having all of your choices/vendors in a single location versus having to call a variety of vendors to figure out who can meet your timeline, budget and dietary restrictions.

The visibility the system provides has been great – the examples above and users know their total invoice before they ever hit submit. All in all the ATG portal has been a great improvement for the business school, the University and the vendors – everyone wins!"

- Jackie C. Ferree

Associate Dean, Finance and Administration  
Raymond A. Mason School of Business



## America To Go (ATG)

Procurement Services identified a need to improve catering infrastructure on campus due to administrative burden being placed on university purchasers through existing processes, increased rates of non-compliant food purchases, limited visibility to the campus community of vetted catering sources, and limited visibility of institutional food expenditures for sourcing opportunities. In April 2018, William & Mary contracted with a third party supplier, America To Go (ATG), to provide concierge catering service to campus in an effort to improve the university's food buying infrastructure. Procurement Services communicated the change initiative to the campus community through delivery of over 100 information and training sessions in hands-on and remote formats, and the ATG portal went into full use in September 2018 for all on-campus food orders other than dining services.

**3,426** orders  
in FY19 worth  
**\$1.6 million**

Noncompliance rates down

**50%** → **7%**

Estimated **\$10,000**  
saved on food purchase tax  
**+\$14,000** saved  
through saved labor time



# Website Redesign

Procurement Services engaged in a web refresh and redesign in order to ease navigation and improve transparency. Starting with a general facelift, some of the new features include homepage tabs for easier navigation, a Procurement-specific search bar, and streamlined options on the Buying@W&M webpage.

For those who purchase laboratory and scientific equipment and services,

Procurement Services posted an updated R&D contract matrix page designed to ease users' experience. Procurement also took part in the creation of a finance forms page, which consolidated all the forms used by various finance-related departments so that users have a one-stop shop. The new page also has a built-in table listing each form's purpose, instructions, and a department contact so that users know exactly how to use the form and find assistance (see the screenshot below).

Form Name	Department	Type	Purpose / Description	Instructions	Contact
Bank of America SPCC Application	Procurement	SPCC	Required to request a Small Purchase Charge Card (SPCC)	Guide to Complete SPCC Application Using DocuSign	Laken Marley
Consultant Approval Request	Procurement	Contract	A professional who provides professional or expert advice in their area of expertise on a temporary basis for a fee.	N/A	Procurement Services
Contract Form Addendum - IT	Procurement	Contract	TBA	N/A	Procurement Services
eVA User access application	Procurement	eVA	To obtain access to the e-procurement system for ordering goods/services.	eVA DocuSign User Application Guide	John Dixon

## Other Improvements

Over the course of FY19, Procurement Services has....

- Published sanctions for SPCC noncompliance to mitigate risk and ensure continued success for the SPCC program
- Enhanced user training—fundamentals, eVA, and SPCC—converted to online 24/7 on-demand format
- Co-created the Independent Contractor assessment process to mitigate the risk of misclassifying employers vs. contractors, which ensures tax compliance and fair provision of employee benefits and legal protections
- Celebrated the 1 year anniversary of the successful implementation of Cobblestone, a searchable and transparent contract management system



# Noteworthy FY19 Contracts

## **Sponsorship and Multimedia Rights** (Awarded)

W&M partnered with Van Wagner Sports & Entertainment (VWSE), an expert in marketing with extensive experience within higher education. This partnership will help the university identify more substantial and sustainable sponsorship revenue streams to support events, programs, and facilities in a manner that is consistent with the university's vision and values.

## **Pouring Rights** (Started)

In FY19, W&M solicited an RFP for pouring rights to supply soda fountains, vending machines, and concessions throughout campus. The contract delivers service, support, and a capital contribution for campus. In FY20, the contract was awarded to Pepsi.

## **Student Health Insurance** (Renewed)

The renewal of this contract allows W&M to continue promoting students' wellbeing on campus.

## **Strategic Printing Services for Campus** (Awarded)

W&M contracted with 9 vendors to offer a larger variety of printing options with greater value to the university. These contracts include services for printing, typesetting, design, layout, binding, finishing, mailing, delivery, and for the first time ever, provides rebates to be paid back to W&M. These contracts will standardize the contract pool for the university's printing needs and provide 3 vendors, to include W&M's print shop, for the ordering of business cards. Furthermore, 7 of the 9 vendors have a SWaM designation, promoting the university's supplier diversity.

## **Introduction to "Open Enrollment" Contract Process**

A contract for Consulting Services was awarded in FY18 with an "open enrollment" provision. On an annual basis, this provision will allow new suppliers to submit offers for the same service category while still allowing those who have previously submitted to remain in the available contractor pool as available supplier options for campus. FY19 was the first open enrollment period for Consulting Services. Twenty-one new contracts were awarded during the open enrollment period. The benefit to W&M is a more diverse and deeper qualified pool of eligible consultants from which to choose.



# Future Goals

In alignment with W&M's 5-year Strategic Procurement Plan, here are a few of the initiatives that Procurement Services is excited to bring to campus soon.

## Dynamic Technology Solutions - Jaggaer

Procurement Services will transition to a dynamic source-to-settle software solution called Jaggaer in order to improve the client experience and improve campus process efficiency. Jaggaer will automate and bring together many functionalities in one system, allowing campus buyers to easily shop through W&M-contracted goods and services online in an Amazon-like interface, as well as providing the ability to create and house various types of contracts and agreements within one system. The implementation of Jaggaer will help campus buyers by providing an accessible online purchasing platform, by guiding users toward contracted goods and services rather than non-contracted sources, and by displaying prices clearly. The improvements and efficiencies from Jaggaer will position W&M to deliver best in class procure-to-pay service to campus within 5 years.

## Inclusive Excellence- SWaM Strategic Plan

W&M already highlights supplier diversity in the overall Strategic Procurement Plan, with the goal to "encourage Supplier Diversity through utilization of small, woman, minority, and/or disabled veteran owned businesses." However, Procurement Services is currently working on an additional SWaM-specific strategic plan in order to communicate the importance and benefits of supplier diversity and outline strategies to promote greater use of SWaM vendors.

## Promoting University Compliance - SPCC Evaluation

As part of its overall efforts to improve internal controls and campus-wide compliance, Procurement is monitoring SPCC infractions to identify common areas of noncompliance. Procurement will use this data in order to improve SPCC trainings to provide buyers with a fuller understanding of policies and how to avoid infractions. Compliance with such policies will increase the efficiency of the buying process.

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### FY19 Annual Report Acknowledgements

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