

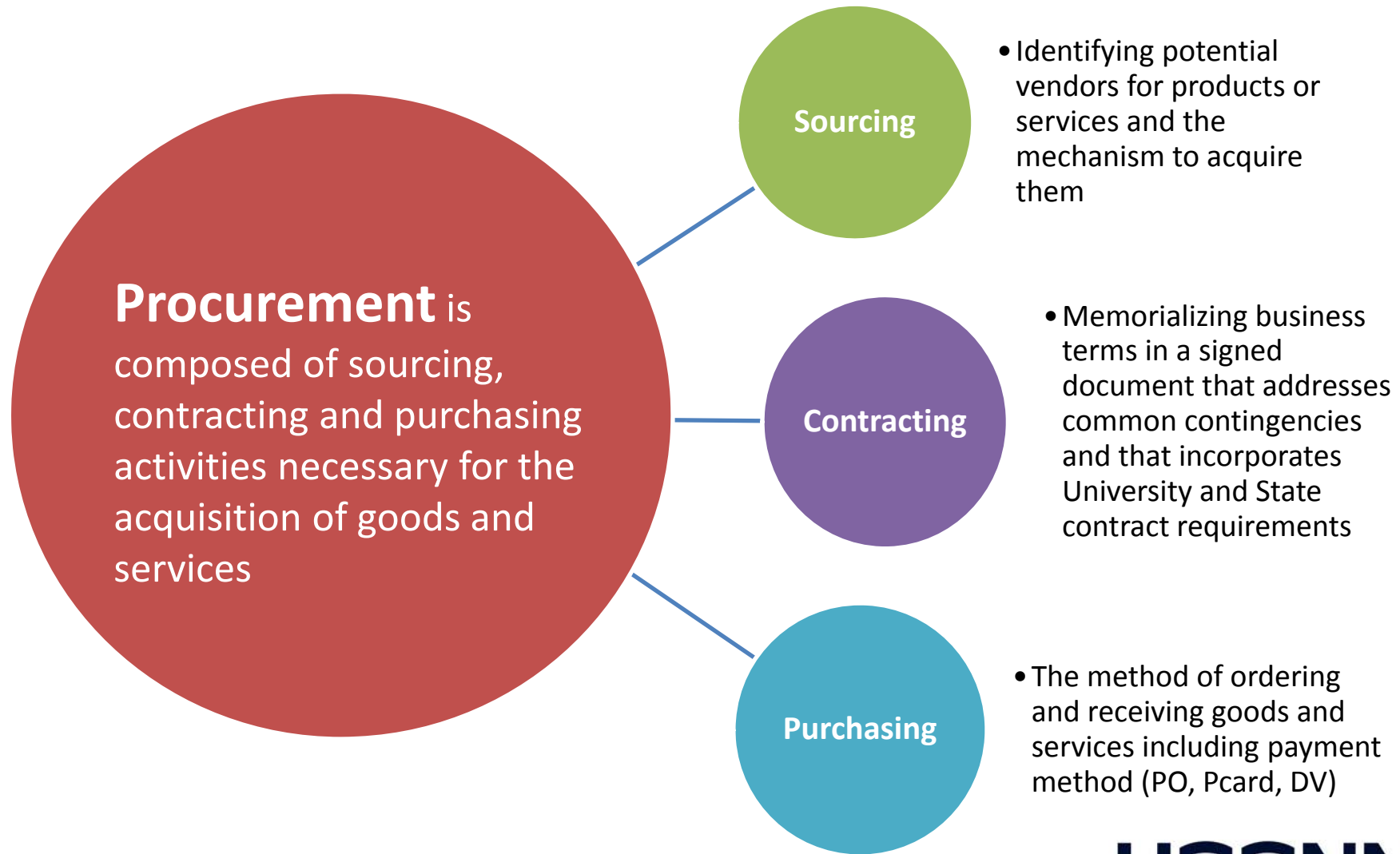
# **Procurement Services Overview**

**UConn**

# Agenda

- Procurement Services @ UConn
  - What is Procurement
  - Terminology
  - What we do
  - How we help
  - Things you need to know
- Projects & Initiatives
  - Success stories
  - Upcoming initiatives
- Why All The Initiatives
  - Surveys
  - Help us succeed

# What is Procurement?



# Procurement Terminology

- **What is a Requisition?**
  - A formal request indicating vendors, types, quantities & prices for products or services a department needs to purchase
- **What is a Purchase Order?**
  - A legal offer to buy products or services issued by Procurement Services, indicating vendor, types, quantities, & agreed prices originating from a Requisition
  - A payment vehicle for products or services purchased under a Contract
- **What is a Purchase Order Amendment?**
  - A formal request to change a Purchase Order
- **What is RFx?**
  - Request for Information (RFI), Request for Proposal (RFP), Request for Quote (RFQ)

# What We Do...



## Our Mission Statement:

It is the mission of Procurement Services to promote the educational, research, and clinical missions of UConn through the **strategic procurement of goods and services** facilitated in accordance with Federal, State, and University laws and regulations to minimize risk and maximize value for all of our stakeholders.

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# By The Numbers

- 15,302 Purchase Orders
- \$584M Dollars Processed
- 505 Contracts Processed
- 400+ RFP's (including construction)
- 590 Bids
- \$16M ProCard (60k Transactions)

Fiscal Year 2015

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# How We Help....

## Buying Goods & Services

- Facilitate public bidding efforts: RFI/RFQ/RFP
- Manage supplier relations and contracts
- Process purchasing transactions
- Create university-wide contracts
- Market research for goods or services
- Assist in creating business terms

## Managing Systems

- Manage eProcurement (HuskyBuy)
- Reporting & Analytics
- Training on Procurement Systems (KFS & HuskyBuy)

## Contracting

- Draft the business and legal language
- Guide the contract through the process
- Advice on business terms
- Negotiate legal terms
- Mitigate risk

## Providing Programs

- Supplier Diversity
- Procard
- HuskyBuy
- UCount

# What Are The Purchasing Tools?

Type	What is it?	When should I use it?
<b>Purchase Orders</b>	<ul style="list-style-type: none"> <li>Catalogue (HuskyBuy)</li> <li>Non-catalogue (KFS) transactions</li> </ul>	<ul style="list-style-type: none"> <li>Purchase of Goods &amp; Services</li> <li>Preferred method for ordering</li> </ul>
<b>Procard</b>	<ul style="list-style-type: none"> <li>Method of purchasing low dollar value purchases from vendors that accept credit cards</li> </ul>	<ul style="list-style-type: none"> <li>Purchase of low dollar transactions or if the items cannot be purchased through HuskyBuy</li> </ul>
<b>Disbursement Vouchers</b>  <i>NOTE: Processed by AP</i>	<ul style="list-style-type: none"> <li>A payment mechanism for goods/services that <b>have already</b> been delivered to the University</li> <li>Up to \$2K per vendor per fiscal year</li> </ul>	<ul style="list-style-type: none"> <li>When the use of HuskyBuy or Pro Card is not possible</li> <li>E.g. – Payments to other universities, real estate payments, professional services, journals, periodicals, etc.</li> </ul>



# When Do You Need to Get A Quote Or Bid?

Bid Prompt	Bid requirements
HuskBuy	<ul style="list-style-type: none"> <li>• Not required</li> <li>• Contracted vendors</li> </ul>
< \$250	<ul style="list-style-type: none"> <li>• No Bid Required</li> <li>• Automatic Purchase Order (APO)</li> </ul>
< \$10k	<ul style="list-style-type: none"> <li>• 1 signed quote required</li> <li>• Recommended to get 3 quotes</li> </ul>
≥ \$10 through < \$50K	<ul style="list-style-type: none"> <li>• Requires an informal bid process</li> </ul>
≥\$50K	<ul style="list-style-type: none"> <li>• Requires a formal bid process that is publically advertised</li> </ul>

Preferred Method

Over \$5k Needs Approval

Purchasing Support Required

# Contracting

- What are the benefits of a contract?
  - Fully and clearly defines a relationship
  - Ensures delivery
  - Ensures quality
  - Provides recourse
- How can I expedite purchases that may require a contract?
  - **Think through your business terms & needs when going through the procurement process**
  - Investigate if your needs can be met within a current contract
  - Speak with a Purchasing Agent for options

# Major Projects & Initiatives

Roadmap Targets Established: Procurement Help Desk

Uniform Guidance

Sourcing Application

Procurement Training Sessions

Website Enhancements

Contract Management: Legal Files

**Formalized Contracting Group**

Expansion of Consortia Buying

**Implementation of eProcurement KFS Replaces FRS / HuskyBuy / E-Invoicing**

Strategic Sourcing Specialists Start

**UCount**

Combine Purchasing & CPCA

McKinsey/Process Improvements

**New Director Hired**

Transactional Processing

2015

2014

2013

2012

2011

2010

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# Future Initiatives

- New training sessions designed to enhance communication
- Procurement Help Desk
  - One procurement point of contact for all your questions
- Provide contract status to the community (Legal Files)
- Streamline bidding process using a software application
- Uniform Guidance Procurement implementation (Federally Funded Purchases) July 2016

# Why All The Initiatives?

## *Voice of the Customer – Round 1*

- Procurement Services issued a survey on Feb 2, 2014
  - To evaluate the strengths and areas of improvement
- Overall satisfaction was generally strong
  - “Courtesy & Respect” across all groups
  - PCard program and the KFS/HuskyBuy Help Desk

## **We listened!**

- Areas of improvement
  - Communication & Timelines
  - Workflow efficiencies, Contracts, Terminology

# Help Us Succeed

- If you have an upcoming purchase, get Procurement involved in the **initial** stages
- Let us help navigate you through the procurement process
- Participate in Procurement Initiatives
- Provide feedback in upcoming surveys
- Use our websites for reference



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# Questions

Contact Information

**Procurement Services**

<http://purchasing.uconn.edu/>

**860.486.2619**

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