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A deeply emotional and contentious presidential election is finally over, and we, as a nation, can take stock of where we are and begin to come together to move forward on the many important issues we face today. No matter how we personally feel about the outcome, we, as procurement leaders, have a unique challenge and opportunity to have impact in a positive way and put our resources to work for the betterment of our institutions and higher education. It won’t be easy but we must, and can, find common ground.

Once we understand the Trump Administration’s higher education agenda and policies, we once again have the opportunity to be at the table to help our administration leadership respond to the opportunities and challenges in those policies. While campaigns can be divisive, we are responsible for bringing people together. NAEP’s Members share common interests to advance procurement in higher education and the communities we serve. We have a passion for what we do, for helping others, and we have a role in advancing the mission of our institutions.

Many of our NAEP Member resources can help you today—Talent Management, Procurement Branding, Supplier Relationship Management, Procurement Competency Model and Interview Questions, RFP Library, Academies, Institutes, Forums, and more. We want to position you to be the valuable asset for the benefit of your institution. We want you to be the ones to make a difference.

As the year winds down to a close, I wish each of you and your families a healthy and happy holiday season. Here is to a successful 2017 in all that we do. Let’s all find our common ground together.
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Big data. Everyone’s doing it. OK—perhaps that’s an exaggeration. Everyone may not be doing it, but they’re certainly talking about it. And it’s easy to see why.

As higher education institutions continue to endure mounting financial pressures and relentless budget battles, savvy procurement professionals have put their numbers to work for them. Innovations in technology have allowed these folks to analyze spend data in ways that were previously unfathomable.

When leveraged effectively, this data provides valuable insight, helping procurement to increase efficiencies, drive meaningful savings, and significantly impact the institution’s bottom line. Equally as important, it helps to elevate the role of the procurement department on campus, distinguishing these individuals as financial stewards focused on advancing the institution’s overall mission and goals.

With so much data and information available, it can be difficult to know where to begin. The road to successful spend analysis is certainly paved with many metrics. Here’s how some of today’s most forward-thinking procurement leaders are navigating that path.

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What tools does your institution use to capture big data, and what are some of the challenges this technology has presented?

Sandy Hicks, Assistant Vice President & Chief Procurement Officer, University of Colorado: Currently we are using SciQuest, Concur, and Spikes Cavell. SciQuest is the software behind the CU Marketplace, which is our P2P system. We use it for our sourcing, supplier portal, and contracting. Concur is our Travel & Expense software. We use it to book travel, submit expenses, and reconcile our procurement cards. We also use Spikes Cavell as our data analytics tool, which categorizes our spend.

The benefit to using each of these platforms is that they’re great in helping you nail tactical processes. The good news is that you’re provided with an enormous amount of data. But it’s impossible to measure it all, so you need to determine what is important to measure, why you’re measuring it, and if your system can pull the data you want to measure.

Many people have the misconception that because it’s technology, you should be able to pull anything and everything out of the system. That’s just not the case. Like with any computer system, the rule is “garbage in, garbage out.” The critical piece to the entire process is how you set up and implement these systems. That has everything to do with the quality of the data you get out of it.

What are the key metrics you’ve identified as most important for a successful spend analysis?

Michelle Smith, Sourcing Specialist, University of Pittsburgh: We’ve created an executive dashboard to provide our management team with an at-a-glance view into our real-time performance. We use these metrics to check the health of our categories, meet diversity and sustainability initiatives, maintain quality customer service, and identify areas of improvement.

Our executive dashboard includes the following KPIs:

Commodity Management
Estimated Savings: We take our total spend and look at how much is contracted or managed by procurement. We have savings ranges we then apply to that spend within targeted categories. One of the initiatives we’re working on for 2017 is to get updated benchmarks from peer institutions to go along with these KPIs. This will help us better understand these numbers in terms of how we measure up with other institutions.

Suppliers: We look at the number of suppliers we have in each category and determine how many of them are contracted. This helps determine if we have spend that can be channeled to those suppliers or if we have a large category of spend where we have no contracted suppliers.

Contract Spend: This tells us how much spend in each category is with a contracted supplier versus a non-contracted supplier. For me, if I’m managing that category, I’m going to ask why a percentage of spend is going to non-contracted suppliers and determine what we can do to channel that spend.

Payment Terms: What are our average payment terms? Are we paying according to contract? Are the terms favorable? In the event that we ever want to change payment terms we can play with the metric to determine potential savings.

Savings Efficiency
Unit Cost Comparison: This report displays the largest gap in price for a single item that is compared by an identifiable part number. It helps us identify if a supplier is charging a different price for the same product and, if we have more than one supplier selling us the same item, it shows what that fluctuation in price is.

Process Efficiency
Cost Per PO & Cost Per Payment Requisition: We’ve calculated an associated cost for these activities from start to finish, including things like processing time, personnel, and cost of system.

Days vs. Term: Here we’re looking to ensure we’re not paying bills early, which could result in interest lost.

Processing Method: This provides a view of suppliers who send invoices electronically versus
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suppliers who send them manually. There's a cost we feed into the system, and it calculates how many invoices we received and how much it costs to process each of them.

Social Awareness

Diversity Spend & Green Spend: We have a large emphasis on working with diversity suppliers, as well as identifying green spend. We look at how much of our total spend is diversity spend and try to find opportunities to move spend to those suppliers when possible. As far as our green initiative, we're paying attention to how much we spend on recycled and green products. If a department tells us they have an initiative to buy more green products, we can use the tools to help them identify those suppliers.

Customer Service

Customer Service Requests: This is a metric that tells us what kind of requests are going into our customer service group, how often they are being contacted, and how quickly the requests are being handled.

Q: Let's talk about department scorecards. What are the metrics you include in these scorecards, and why are they important?

Renee Funk, Strategic Sourcing Manager, University of Iowa, and John Watkins Director of Strategic Sourcing, University of Iowa: We've found that the individuals in our departments are often surprised by the metrics we provide because they're not able to see that information in the day-to-day processing of transactions or in the reporting they do. Providing them with an overall snapshot of these numbers has been a great benefit, and they're requesting this information on a more regular basis.

We meet with each of the departments on campus annually to take a deep dive into a number of areas including, but not limited to:

- Spend by organization/department;
- Spend by month;
- Spend by transaction type (e.g., PO, eBuy, procurement card, e-voucher, and state funding);
- Spend by user;
- Contract vs. off contract spend;
- Bid opportunities; and
- Policy compliance.

We begin by taking an overall view of spend for a specific organization within our university and break that spend down by department. We look at it not only by total, but also by transaction type: e-voucher, eBuy (our B2B channel and preferred method), credit card, or purchase order. That broad view gives the department a really good gut check into the metrics provided and demonstrates accuracy or questions with the data.

We then take the data in a slightly different direction and look at how spend is dispersed throughout the year. Many times we’re able to identify a trend within a department by looking at things this way. For example, it’s not surprising to see a spike in June and July around fiscal year-end time, but let’s say we’re meeting with athletics and notice an increase in spend in September because they’re gearing up for basketball season.

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We can see this trend and ask how we can work together to get in front of these activities rather than facing a rushed sole source situation in September. The data allows us to be proactive instead of reactive.

We further break down each of those transaction types by PO. We’ll look at sole source justifications and see if we can transition any of them to bids. We’ll look at competitive bids and encourage our individuals when they’ve done them well. We look at state funding versus non-state funding, and we look at it by the individual in the department, and by area. Every way we can possibly look at a transaction to see what might be going on, we’ve done a good job of capturing it.

It may sound like we’re getting down in the weeds, but the conversation with the department is extremely positive and ends with a final view of the data from a perspective of opportunities. That’s the reason to share the information. The numbers drive the occasion.

**Q. What are some common pitfalls or things to avoid regarding big data and metrics?**

**Don’t:** “Try to measure everything. It’s important to manage peoples’ expectations with the data that you have. Before you dive in, take a step back and look at your goals. Determine that the things you are measuring are impactful and don’t try to do too much. There’s no better way to measure a goal than to be able to do it objectively, and that’s really what data gets you.”
—Sandy Hicks

**Don’t:** “Blindly trust your tool. You need human intervention to review and improve the data. You’ve got to put in the time on the front end of the process to cleanse the data and to understand how it is being classified. From there you can refine the information and create rules for tagging/classifying spend to build repeatable processes. You can’t leave it up to the tool or provider to do all of this for you. You need to be heavily invested in the process, as you are the subject-matter expert for your data.”
—Michelle Smith

**Don’t:** “Be afraid to try. You’ve got to start somewhere. Even if you think you have nothing, the truth is you have something. Start with spend as a whole, build upon that, and then you can continue to find ways to grow. And don’t be afraid to try something new based upon the data. You might make the wrong decision, but you’ll learn how to better use the numbers in the future.”
—John Watkins

**Don’t:** “Forget to have a conversation. The data speaks volumes, but if there isn’t an active conversation about that data, more than likely the change will not occur, or if it does, it will be very short-lived. For us, data has been a valuable pathway to communication and developing a procurement department that is less reactive and more proactive.”
—Renee Funk

Nicole Katz is the Communications & PR Supervisor at E&I Cooperative Services. Email: nkatz@eandi.org.
Buckle Up for the Ride
Procurement in an Online Institution

by Mary Dukakis
Southern New Hampshire University

When I was asked to write an article about how supporting an online program affects the way the typical university procurement department conducts business, my thoughts quickly went to the first standard commercial production agreement I had to review when I was just one month on the job at Southern New Hampshire University (SNHU). Who knew that you had to look for the reference to the bus that was going to drive across the country? I also immediately thought about the new vocabulary I have had to learn, such as “lead vendors” and “search engine optimization.” The University—online—is structured differently from a typical institution. We buy things that may not be traditional to higher education. But, the real story is in the culture and how it defines everything that we do and why we do it. SNHU is an organization that is passionately committed to changing the lives of its students. This passion, combined with innovation, collaboration, and the unique need to move at lightning speed, has caused us to create a procurement department that must be agile and flexible in meeting our customer’s needs. We are still changing, evolving, and growing rapidly, but we are keeping up! Let me share with you some examples of what we’ve encountered as we take on the challenge.

SNHU has three main academic units. University College (UC) is the traditional, coming-of-age program that is housed on a residential campus serving 3,000 students in Manchester, New Hampshire. The College of Online and Continuing Education (COCE), with more than 70,000 students, is the online program that is geared towards the adult learner. The College for America is an employer-sponsored, competency-based program with 3,800 students. Each of these units is supported by centralized University Administration that includes Human Resources, Finance, Information Technology, Facilities, General Counsel, and Compliance. SNHU’s growth over the past six years includes a 500 percent increase in student enrollment and an increase in employees exceeding 200 percent. The Office of Procurement and Contracts consists of five full-time employees. It manages the procurement of goods and services for all three units and University Administration.

It is important to understand SNHU’s mission in order to appreciate how and why we do what we do. It is to “transform the lives of students.” We seek to provide the best support in higher education.

As with any university procurement department, we needed to build our organization to be seen as a value-added partner to SNHU’s business units. What’s different is the way we are asked to approach projects. While we do procure goods and services that are similar to other schools, there are some unique projects that require a different approach to sourcing. For example, we’ve facilitated solicitations for curriculum designers and proctoring systems. We also review numerous contracts for sponsorships,
lead vendors, and commercial production. The commitment to students, innovation, and speed is what makes supporting procurement at SNHU different.

**Commitment to Students**

There are many examples of SNHU’s dedication to its students. Each one in our online program is provided an advisor. This advisor will check on the student’s progress and jump in if they notice the student having difficulties. Everything is done with the intention and focus to the student experience. This a culture that permeates through all the business units.

The extent of Administration’s support to students was best demonstrated when the Business students at UC put together a business plan for a food truck. This business plan was presented to SNHU president, who was so impressed with it that the students were given seed money to purchase the truck and all the necessary start-up equipment. While the students had a great business plan, putting it into action would take some work. This included everything from buying the truck, shipping it to campus, training, and determining how the money would be handled. The plan did not take into account these details. On top of it all, the students who put the plan together were graduating in a few months.

The Finance team, despite other projects in the queue, came together to support the initiative. We met with the students in the classroom to answer their questions and provide guidance. Procurement worked with the food truck manufacturer to have it built and shipped. We also assisted with the point-of-sale system and a risk-management plan.

Upon delivery of the truck, the students were thankful for our assistance, but it did not stop there. We continued to meet with them and with the new students who took over the truck after the original students graduated. The lead faculty met with us after the first semester to get our thoughts on how the project went and lessons learned.

**Innovation**

SNHU recently opened the Sandbox Collaborative, a research and development lab of strategy and innovation. One of the challenges the University faces is the never-ending onslaught of technology vendors looking to sell the next-best-thing in online learning. The Sandbox Collaborative took on the challenge of determining a way to tackle the review of these vendors.

As part of the solution, the Sandbox team started monthly Ed Tech Lunches. Think of this as “Shark Tank” for education technology. The team designed the lunches to provide an opportunity for these new, start-up companies to present their products to a panel of SNHU academic leaders.

Because many of these vendors are start-ups, the team asked Procurement to have a seat at the table and represent the business side of the evaluation. We are working to develop an evaluation scorecard, from standard insurance and references to data security standards and compliance. We interviewed key stakeholders across SNHU, as well as some of the start-ups themselves to determine what is typical in the start-up environment, so that we can appropriately evaluate these vendors.

**Speed**

At times, it seems everything SNHU does is at lightning speed. This is primarily due to its explosive growth. As our enrollment expands, so does the number of staff. The growth in personnel was taxing the Facilities Maintenance Department. Our online program is housed in an old mill building, called the Millyard, along the Merrimack River in downtown Manchester. In just six years, we went from 27,000 to 207,000 square feet, housing 1,400 staff. The amount of construction and reconfiguration of space was happening at a dizzying pace.

Each new wave of incoming students created the need to hire more staff. This required moving or building walls, new furniture, technology, and conference space. We quickly realized that if we continued to bid every construction project, as our procurement policy required, Facilities would not be able to do the renovations during the short windows of time they were given. When working for a school that is experiencing tremendous growth, there is no patience for slowing down the ability to properly service students.

We recognized that Facilities needed flexibility to get its job done. We collaborated with them on a solution and developed two programs: preferred architects and preferred general contractors. These programs prequalified architects and general contractors, established master service-agreements and standard rates and mark-ups, and modified the procurement policy related
Collaboration

When our academic colleagues are constantly challenging the status quo, we in Procurement must also. For years, SNHU conducted an annual assessment of staff and faculty technology needs, did a quick RFP for the requested technology, and placed a large order, at the same time many other institutions across the country were doing the same. Procurement heard grumblings from Information Technology Services about the process, from both internal and external perspectives. Additionally, staff were starting to be hired by the dozens, particularly for COCE, and there were communication inconsistencies in planning for these new hires. We asked our technology vendor for more than our fair share of rush orders of laptop computers. Three years ago, after attending the NAEP New England Regional Conference and discussing the issue with my colleagues there, one suggested inquiring with the vendors to see if they could provide an inventory of commonly purchased laptop configurations that would be more quickly available.

We brought the idea to the ITS team, and they loved it. We also took time to listen to their other concerns, from having difficulty handling large pallets, to needing inside delivery at our Millyard location, to requesting a quick-order website, to needing changes in the budgeting process and placing the annual order. We went out to bid asking these questions and more, and ended up selecting a vendor who was able to deliver competitive prices, as well as all the services we needed at no additional charge. At first, ITS was hesitant to believe that a vendor could do all this and still be the lowest price, but we convinced them to see what happened if we asked. There have been some bumps, but each year we become further and further streamlined. We could not have done any of these things if it wasn’t for the collaboration of our NAEP colleagues, ITS and Financial Planning and Analysis teams, and our vendor partnerships.

Acknowledgements

Thanks to Sara Veilleux, Associate Director of Procurement and Contracts, for her contribution to this article.

Mary Dukakis, Associate Vice President of Strategic Sourcing at Southern New Hampshire University, Manchester, has more than 20 years of experience in higher education, as Director of Campus Business and Procurement Service at Berklee College of Music; Director of Procurement Services at Brandeis University; Purchasing Manager at Wellesley College; and Chief Procurement Officer for the Town of Brookline, Massachusetts. She has a Bachelor of Business Administration from the University of Massachusetts at Amherst and an MBA from the FW Olin Graduate School of Business at Babson College. She is a Past President of NAEP’s New England Region, a presenter at NAEP New England seminars, and has served on several NAEP committees. Email: m.dukakis@snhu.edu.
“Do more with less” has been the mantra of university life for as long as procurement has been around. Leadership has given procurement departments the directive to find savings, while procurement seeks to promote a reputation of partnership and goodwill on campus. Beyond purchasing, what else can procurement pros do to deliver value to campus? Here are four successful trends that are directly impacting the industry today.

Suppliers Are Partners, Not Adversaries

Often, relationships with suppliers are viewed as strictly transactional, with procurement professionals treating suppliers more as adversaries and keeping them at an arm’s length. Suppliers can be viewed as merely a service or product provider, with their value only recognized in terms of price. By treating them as partners instead, a symbiotic relationship develops that can provide value beyond savings. Buying from suppliers who are partners can lead to substantial gains and even better achievement of strategic goals.

The flip side is to look at the negative impact that can occur by maintaining strained supplier relationship practices. A partnership with your supplier provides open communication and ensures contracts are managed and reviewed regularly. Those that remain as unmanaged contracts can drain a substantial amount of value over time. This drain is a result of relationships suffering from neglect, not working together towards a common goal.

Enhancing supplier relationships is a strategic process that will, in turn, increase supplier performance. To do this, rely on your supplier and contract management technology to eliminate the manual processes and provide you with reporting, purchasing history, and other critical data to free up your time for strategy development.

NAEP’s 2016 Innovators Forum Report, *Enhancing Supplier Value and Performance*, offers great insight into this topic and shares tips on improving supplier relationship management.

Look for More Environmental Regulations and an Emphasis on Sustainability

Concerns over the environment are driving demand for more sustainable products and procurement processes, the reduction of waste and pollution, and reduced dependence on non-renewable resources like fossil fuels. Look for increasingly stringent legislation to come, backed by consumer sentiment for the environment. Smart procurement professionals are identifying and buying sustainable products, using shippers with good environmental records, and eliminating waste wherever possible.

Where do you begin implementing sustainable purchasing practices? Take a page from a strategic sourcing playbook. Start with:

1. Determine target spend by analyzing and prioritizing best opportunities; avoid wasting resources in chasing “the long tail.”
2. Create a sourcing team—whether it is dedicated personnel or special forces within your department—that can set priorities and measure results.
3. Identify green suppliers and negotiate contracts.
Leveraging spend analytics, e-sourcing, supplier management, and contract management tools will allow you to get started, but it is leadership that will drive change toward sustainable purchasing.

**Mobile Devices are Achieving Mainstream Acceptance**

We all love our smart phones. Calling, texting, emailing, and calendaring are all daily activities we have at fingertip access. Plus, we can find an app for just about any service we need. So why not utilize our phones more to speed the procure-to-pay process and help keep things moving while traveling or away from the office?

A procurement mobile app allows us to view attachments and comments, and approve purchase orders, invoices, and requisition orders on the go. We can also identify other approvers to keep the workflow moving and contact others via email or call by tapping on their name in the app.

Mobile use for procure-to-pay-related activity improves workplace relationships and increases efficiency in expense reporting, purchasing, and invoice approval. Mobile is more than an add-on when it comes to procurement, invoice automation, and payments software. A mobile app allows us to leverage the flexibility of our mobile workforce and fully realize all the benefits of automation, process improvement, and cost reduction.

**Analytics Will Play an Increasingly Important Role in Procurement**

If your organization hasn’t yet adopted big data, get ready, because it’s coming. Analytics are playing an increasingly prominent role in university procurement (as well as in virtually every other profession). But this is a good thing! Do you know if maverick spend is costing you money?

As a single source of truth, spend analytics will provide insight into your spend, identify preferred suppliers, uncover new savings opportunities, improve compliance, and help you streamline processes.

These are just a few trends to think about as 2016 comes to a close. As procurement becomes more of an essential strategic partner to the university community, it is inspiring to see how procurement teams are leveraging technology to achieve their larger goals.

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**Jack Fine** is the Vice President at SciQuest overseeing Solution Engineering & Customer Success worldwide. Email: jfine@SciQuest.com.
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Everyone’s talking about big data, but not everyone knows why. Higher education procurement operations collect reams of data, and now, procurement managers are realizing how much value that data holds if only they can understand and use it properly. Why is data the new focus for procurement? Because from data you can deliver outcomes. However, the challenge for procurement, and for most other departments, is getting access to data that is ready for use, such as for analysis.

With advances in technology, universities and colleges of all sizes are now able to source affordable software that can be deployed quickly. Let’s assume you have access to an analytics tool that empowers you to easily obtain, integrate, cleanse, and enrich data. This assumption is essential because we can focus our discussion here on helping you create the most value out of the data sitting in your institution’s multiple systems, including ERP and procure-to-pay.

Where to Start
Analytics is a journey, so start with the problem or issue you’re trying to solve, such as where to identify savings. By asking questions, and then answering them, you’ll quickly generate insight that will lead you to creating opportunities by simply adding more data to your spend analytics tool.

Here are a few questions that we see procurement teams seeking to answer over time.
Why Spend Analytics is Hot

Spend analytics is a must-have for every procurement team. Its value is no longer up for argument; the only outstanding question is what tool do you use to obtain the necessary data to visualize, improve, and manage to support your school’s strategic objectives.

In the spirit of inspiring you, I have provided five ways you can effectively use data and analytics to strengthen the financial running of your institution:

- **Contract compliance**: You have contracted with suppliers to provide goods and services. However, do you know when a supplier goes off-contract and delivers something that doesn’t meet your specifications? Spend analytics, integrated with contract data, will inform you when items have been placed on invoices that go against your supplier agreements.

- **Cash flow**: Lack of spend visibility negatively impacts your school because you can’t manage cash that you don’t see. Spend analytics can help you improve cash flow by better understanding the cost of paying suppliers early. Further analysis, such as high purchase order volumes under $100, could reveal an inefficient accounts payable process that requires your immediate attention.

- **Tail-end spend exposure**: The quickest savings opportunities can be generated by getting a grip on the biggest spend with your biggest suppliers. Yet, the largest savings are often found in the tail—the 20% of total purchasing spent with your smaller suppliers. The challenge for many institutions is first obtaining visibility of the fragmented tail-end spend followed by effectively managing it to conclusion.

- **Overpayments**: Unplanned overpayments are inevitable, but if they happen frequently they are a sign of something potentially more severe such as fraud. It’s vital that you identify erroneous transactions so you can recover these overpayments. Analytics will also help you minimize duplicate payments, preventing your school from leaking cash that is needed elsewhere.

- **Supplier diversity**: Establishing supply chain diversity isn’t just good business, it’s often a government requirement. The challenge for most institutions is not knowing the types of suppliers; and this lack of visibility can often limit business growth. Spend analytics will tell you how many of your suppliers are minority and women-owned, and through this knowledge you’ll be able to establish a more robust sourcing strategy that will create significant value for your organization.

Your data holds enormous power. Unlock it!

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**Lance Mercereau**, Chief Marketing Officer of Rosslyn Data Technologies, has lived and breathed technology for more than 20 years, having helped to successfully bring to market new and emerging technologies. He started his career at the height of the San Francisco dot.com era, advising start-ups on business strategy, customer acquisition, alliance ecosystems, corporate affairs, and brand management. Lance was one of the early evangelists of cloud-based services when he joined Rosslyn Analytics in 2009. He lives in London, United Kingdom. Email: lance.mercereau@rosslynanalytics.com.

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Back in the 1980s, Madonna crooned about living in a “material world.” The pop star wasn’t trying to impart important financial lessons for procurement officers in that hit song. Let’s face it, she probably didn’t have maverick spend in mind as she sang about proper credit. Though our world has changed dramatically along with Madonna’s career in the last 30 years, many procurement departments are still living in that material world of the 1980s, bogged down by decades-old technologies—like paper.

Back then, most of a procurement officer’s work was done with physical materials: pen, paper, and typewriters. Computer use was just beginning to make inroads. Sealed bids were placed in wooden boxes with manual locks. Sprawling rows of filing cabinets were filled with overstuffed manila folders packed with yellowing vendor agreements. Office assistants spent hours getting the needed signatures for contracts.

The world we’re living in today is much different. We might like our material things, but our smartphones, tablets, and other gadgets are poles apart from the pen, paper, and typewriter of 30 years ago. Our lives are lived digitally—in the cloud.

At home, we store everything online, from family vacation pictures to mundane to-do lists. We buy online, too. When we need something we head to our smartphones, find the item in seconds, click “purchase,” and get delivery in two days, sometimes in a couple of hours.

At work, we’ve seen the same transformation. In the procurement field, RFX requirements, vendor invitations, evaluations, and awards can all be handled online. Similarly, suppliers, pro-
Procurement professionals, and end-users expect to have access to the same convenient, fast, and easy-to-use applications that they're already using at home.

In this new world, institutions find themselves under increasing financial pressure. Shrinking budgets, rising costs, and uncertain enrollment levels are all adding to the strain. The good news is that the technology available to procurement today can bring some relief to the financial discomfort and make it easier for stakeholders and customers to participate.

The latest advances in procurement technology are already rolling out at institutions across the country and helping to drive savings. Here are some examples.

**Cloud Computing**

More and more business tools are migrating to the cloud, and that includes procurement technology. This new way of working is a boon for procurement departments that must manage and track spend across a single campus or a network of distributed campuses. In fact, at ESM, we’ve seen entire university systems take control of their spend with cloud-based software.

Why is it becoming so popular? Cloud computing provides a low-cost entry to procurement automation, makes for a quick rollout, and requires little-to-no IT overhead. It also enables organization-wide leverage of purchasing power. It’s easier for every single academic department, for instance, to order bottled water from the same vendor, ensuring the best price, putting the organization in the best position for valuable rebates.

**Supplier Collaboration**

New sourcing solutions allow suppliers and procurement officers to work collaboratively. No longer will it be a one-way conversation in which suppliers are waiting on decision-makers for feedback.

New tools streamline communication with suppliers who have new visibility into RFX processes in the higher education institutions they serve. The solutions allow suppliers and institutions to communicate online, ask questions, and clarify requirements.

Cloud-based sourcing and procurement solutions also help procurement professionals and other users align their spend with the strategic goal of an organization, whether it’s to purchase more sustainable products or contract with historically underutilized businesses.

**User Engagement**

Anybody in procurement knows that new software on its own won’t solve an organization’s problems. It takes widespread adoption of the new solutions. Procurement technology must be easy and intuitive, providing an interface that looks no different than websites used at home.

That means no more ugly gray or green screens made famous by ERP systems. New, intuitive user interfaces that look like any other e-commerce site online will speed up adoption and encourage repeated usage.

Mobile enablement is also critical. People expect to access applications and information from anywhere at any time. Procurement technology must meet customers and colleagues—where they are and respond to how they want to work—and that is more often on mobile devices such as tablets and smartphones.

**Summary**

We’ve moved on from the material world of the ‘80s with its Walkmans, VCRs, and mobile phones the size of a suitcase. We’re now in the digital world. You have a computer in your pocket. You can access any information from anywhere at any time. Your suppliers are there, your colleagues are there, and the tools to take procurement there are here. They are ready, willing, and able to adopt these technologies for procurement and help you save huge sums of money in the process. If you haven’t done so already, it is time to bring your procurement function along to the 21st century.

Anthony Rotoli, Co-CEO of ESM, a provider of cloud-based procure-to-pay solutions, brings more than 20 years of experience in the corporate, public, and higher education sectors. At ESM, Rotoli has rapidly transformed the organization and its sales and marketing strategies, increasing revenue and launching affordable new solutions to help institutions manage today’s financial realities. Email: arotoli@esmsolutions.com.
Chief Business Officers Roundtable

Presenters: Kim Kvaal, Vice President for Financial Affairs, St. Edward’s University; Andrea Marks, Vice President and Chief Financial Officer, UT Health Science Center at San Antonio; Darrell Morrison, Vice President for Business Affairs/Chief Financial Officer, Texas A&M University—San Antonio; Howard Teibel, President, Teibel, Inc.

Chief business officers (CBOs) have many people and departments reporting to them. Some of these people and departments have direct involvement in the institution’s strategic planning, and some don’t. Regardless of responsibilities or expertise, the strategic goals require the communication process between all involved to be open and structured for success, a sentiment that had the panel of CBOs agreeing during this session.

A lack of communication can weaken even the best process. For institutions, that weakness can have the greatest effect on its procurement department. Generally, the procurement department isn’t fully aware of the goals of an institution, leaving them blind to the overall strategic plan.

Procurement’s impact can be immeasurable, but only if it is utilized correctly. As higher education continues to change, campuses grow, and new technology is implemented, the old way of doing things just doesn’t work. CBOs need to be more aggressive, create more ownership, and speak to a better way of doing things. More time should be spent creating a structure that focuses on procurement.

Procurement supports all departments within an institution, leveraging the overall purchasing power, as well as evaluating and negotiating agreements and facilitating the acquisition of goods and services. The experience of the faculty, the students, and staff are all enhanced when procurement is actively involved. It’s insufficient to say that procurement’s only role is to keep costs down. With this narrow view, procurement will continue to be seen as a necessary evil or a delay in the process, instead of as a helpful part of the team.

So how does the process change? How does it get better? This panel understood that achieving maximum benefit from procurement professionals depends on informing them of the strategic plan, as well as informing other staff of procurement’s importance to an institution. A mutual respect needs to be created. CBOs need to advocate for the procurement department, highlighting its critical role in the strategic plan of the institution—working together to achieve the same goal.

While CBOs have a responsibility to bolster procurement’s reputation, there are actions procurement needs to take to add to strengthen their own position and reputation. The CBOs on this panel agreed that creating a plan with strategic choices was a good place to start. They suggested making it flexible with specific objectives. If you wait, someone else will create a plan for you.

They encouraged procurement leaders to be proactive and engage more. CBOs aren’t always aware of the details and challenges procurement is facing. Bring your issues, as well as your innovative ideas, directly to CBOs. Building that dialogue and direct relationship would be mutually beneficial.

Procurement leaders should build teams with a clear mandate, energized for success. Work to create a culture of accountability, collaboration and empowerment. And forge systems with an eye on effective service delivery and long-term financial sustainability.

Finances are a major issue for institutions and because of this, flexibility has been lost. While some might see this as a challenge, others see it as an opportunity—a chance to take a fine-toothed comb to its bidding process and procurement procedures.

Your procurement department is an integral part of your institution; a reflection of any CBO and his/her success. No school can meet its goals without it. And its impact on an institution can be immeasurable. Procurement can no longer be an afterthought. It’s time to build its voice and make it known.

ANNUAL MEETING SESSIONS: HIGHLIGHTS

NAEP’S 2016 ANNUAL MEETING in San Antonio, Texas, was all about Mapping Procurement’s Future—and we certainly did! So many enlightening sessions were available. Here are highlights from two very informative roundtables that had attendees excited for the future. The first summarizes a roundtable comprised of chief business officers. The second describes one university’s innovative program to solve its campus revenue problem.
Procurement’s Role in Solving the Campus Revenue Problem

Presenters: Richard Taylor, Director, University of California Berkeley/San Francisco; Stacey Templeman, Buyer, University of California Berkeley

In 2011, the University of California, Berkeley was experiencing a decline in state funding, student fees were on the rise, and campus costs were adding up. Its solution at the time, among other things, was to cut expenditures to become more efficient. After these budget issues became a joke on late-night television, the institution realized it was in desperate need of a total reevaluation.

To begin, UC Berkeley needed to gain a better understanding of the value of its assets. The campus was undervaluing itself and really needed to improve/expand its strategic sourcing efforts. It became clear that it needed to focus more on increasing revenue, not just cutting its way to success.

It began slowly by increasing its strategic sourcing efforts, developing a campus shared services center, and updating its administrative systems. Its efforts were a success, seeing an increase in revenue. As a result this success, UC Berkeley created and implemented the University Partnership Program (UPP).

All About UPP

UPP connects world-class businesses and industries with the world’s greatest public university to foster dynamic, meaningful partnerships. It is responsible for exploring, managing and advancing strategic university-wide collaborations that provide mutual benefit to the university and its partners. UPP provides Berkeley with the structured process to engage comprehensive business partners, which allows for deeper engagement from students, faculty and staff.

The old way saw each department—athletics, alumni, etc.—pursuing partnerships while sometimes working together and sometimes apart. Procurement was oftentimes working separately to secure a vendor within that same category, which led to multiple partners within the same category on one campus.

The new UPP model provided the infrastructure necessary for the campus to join together to create preferred partnerships that were mutually beneficial to the university as a whole. UPP also offered revenue generation support and partnership expertise to units across campus while providing a consistent, professional approach to the university’s mission, values, and purpose, ensuring corporate partners the opportunity to have meaningful engagement with UC Berkeley.

Following are the four guiding principles of UPP:

1. Brand Alignment – shared mission and values;
2. Priority Campus Services – contributing to the UC Berkeley experience;
3. Impact – meaningful program support, sustainability and industry innovation; and
4. Revenue Growth – pursuing significant partnerships the unlock new campus revenues and program support.

For UPP to be successful, it needed the assistance of procurement, as well as other stakeholders on campus. Therefore, an Advisory Committee—including staff from different departments, at many different levels—was formed. The Advisory Committee advises on policies to guide UPP, consults on new opportunities, reviews working group recommendations, and sends opportunities that it endorses to the Executive Committee for approval. The Executive Committee sets the strategic vision and values of the program and reviews and approves partnerships.

Dynamic Partnerships That Are Mutually Beneficial

“UPP is able to provide the infrastructure for our campus to join together to create preferred partnerships that mutually benefit the institution as a whole,” said Richard Taylor, CPSM, CPM, UC Berkeley, Director, Supply Chain Management. “It offers revenue generation support and partnership expertise to units across campuses, while providing a consistent professional approach that adheres to the university’s mission.”

UPP has helped UC Berkeley realize $14 million in savings through its sourcing efforts in 2015, and $8 million so far in 2016. It has saved about $75 million since 2011 and will continue making its overall goals about the students, with future partnerships geared toward helping the campus increase revenue.

“It has taken time to get where we are today,” said Taylor. “Procurement is a journey not a destination. Not one size fits all. Implement what will work for your institution.”

For more information about UC Berkeley’s program, visit http://upp.berkeley.edu/
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What’s Hot in the NAEP Forums?

by Greg Macway
University of California, San Francisco/Berkeley

The NAEP regional meeting season has come to a close and many of us have probably shifted our attention to the holidays. But a great way to stay engaged with NAEP is to participate in the discussions in the Forums on the NAEP website. The Forums are a great way to keep up with trends in Educational Procurement and to share ideas, documents, and best practices with your peers.

Regional forums are set up for each to discuss local issues and conferences. There are specific interest group forums for supplier diversity and sustainability. (Please note that these two forums only are open to the higher education public and vendors.)

The Forums are moderated by NAEP staff, who are ready and willing to answer any technical questions you may have. To ensure the best experience for all members, they enforce some simple rules and guidelines to keep information flowing professionally. One: No attacks on other NAEP Members. We wouldn’t allow that in person, so it applies online as well. Two: Don’t advertise. Three: Keep the language professional. Easy stuff.

Here are a few of the trending topics (NAEP login required):

**Vehicle Replacement Programs**
http://bit.ly/HeardontheStreet1

Jerry Robinson at the University of Richmond is interested in fleet management. Arizona State University and Vanderbilt both shared their experiences with other institutions showing interest in similar programs.

**E-commerce Ship-To Addresses**

Rosey Murton at Wake Forest University is looking at best practices for ship-to address configuration and use. Campuses all across the country provided documentation and information on how their systems were configured.

**Transitioning to Workday ERP from Banner**

As campuses grow, technology needs change. Many campuses are upgrading their enterprise systems and are looking for best practices. Brown University and Southern New Hampshire University have undergone this transition and shared their experiences; other members are excited to learn.

**Searching for Amazon**
http://bit.ly/HeardontheStreet4

A search of the Forum for “Amazon” returns many topics on how to integrate with the online distributor. Topics like enabling punch-out catalogs in e-commerce, physical distribution centers on campus, opening business accounts, and locker programs are all available within the online forum.

These are just a few examples of the information being shared among your peers. Jump onto the NAEP forum and share your ideas, ask questions, and participate in the NAEP community!

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**Greg Macway**

Greg Macway is the Director of Strategies & Communication in Supply Chain Management at the University of California, San Francisco/Berkeley. He is a member of the Editorial Board for the NAEP Educational Procurement Journal. Email: Greg.Macway@ucsf.edu.
Everyone Has a Story to Tell
What’s Yours?

by Bob Ashby, C.P.M., CPCM
University of Nevada, Las Vegas (retired)

I want the epitaph on my tombstone to read, “He was a teacher.” I want everyone to understand that even more important than my accumulated lifetime of knowledge and experience is the fact that I paid it forward by sharing that information with those coming behind me. Yes, I want to be remembered as a teacher, one who educated his peers to keep them from stepping into the same minefields as others before them did, someone who made their life easier because of the stories he told. Because that is what a teacher does.

There are two ways to tell a story. Some of our more experienced peers, those comfortable speaking before a crowd, share their knowledge and experience as workshop presenters at our conferences. Others prefer to share their stories via columns in the NAEP’s Educational Procurement Journal. Both of these types of storytellers are teachers.

Either way, as I have often noted, these folks accomplish two things: (1) since promotions into higher leadership positions require greater levels of oral and written communication skills, by sharing their stories in one of these ways they gain necessary and valuable preparation and presentation experience; and (2) they always learn more than the reader or workshop attendee, because they must display superior subject knowledge in preparation for the inevitable rebuttals and counter-points to their thoughts and ideas.

Those wanting to accelerate their climb up the professional ladder must learn these two skills; that is, they must learn to be teachers and storytellers. Therefore, I propose that we provide a forum to guide them through this maze and accomplish just that. I further propose we do this as a panel discussion at the 2017 NAEP Annual Conference in Reno, Nevada, using the best presenters and writers within our NAEP arsenal. What I must have, though, is feedback from you, the potential teacher/storyteller. I need to know whether your preference is a forum on how to be a presenter, a writer, or both.

Regardless of which you choose, I further need to know what has scared you—to strong a word?—thus far, from becoming a teacher or storyteller. Need help in choosing a topic? Outlining your presentation? Tailoring your presentation to your target audience? Accepting criticism? Also, which presenters and writers do you appreciate the most and want to see on such a panel? Which do you not? Should we have only existing NAEP writers and presenters or do you have a preferred source for our panel, and why? Remember, this proposed forum is for you, the bid in the garden waiting for an opportunity to become a rose, the lump of coal mourning your time until you turn into a diamond, the ugly duckling waiting to turn into the beautiful swan, the—well, you get the idea.

I am excited about providing such a learning experience and introducing you future leaders into the wonderful world of storytelling. Many within NAEP are as excited as I am about developing the next generation of annual and regional conference presenters and NAEP Journal writers. Do you have a story to tell? Want some help up the ladder to that next level? Want to add this talent to your resume? Let me hear from you.

Write me at ashbybob@embarqmail.com, and let’s talk about this exciting opportunity.
Periodically, there are external changes in the business, legal, or political arenas that can impact business operations on college and university campuses. Some, such as a major war or the oil crisis of the 1980s, affect inventories of needed goods. The Great Depression spawned the formation of purchasing cooperatives, as colleges and universities pooled their spending to reduce the cost of goods and services. The emergence of women-and minority-owned businesses, coincident with a changing social contract, led to the development of diversity programs. Sustainability programs were developed due to the emergence of environmental consciousness, and technology developments opened the door for e-marketplace solutions.

Change happens.
As the cost of higher education continues to increase faster than the cost of living, or more importantly, the ability of students to keep pace with the rising costs, university presidents and governing boards are searching for ways to hold down increases by identifying new sources of funding for capital and other operational programs.

One response has been the privatization and outsourcing of non-academic programs. This privatization can provide a one-time windfall that cannot be repeated in future years. Another response is the growth of online education.

Most recently, some universities have been actively seeking to structure their relationships with the business community, with consideration for the value added to the brand from affinity and access to the university community, including faculty, staff, alumni, and the 18-to-24-year-old student demographic. This is not philanthropy, and it is not sponsored research. It is sponsorship built upon the recognition that the academy has assets, tangible and intangible, that have the potential to be a catalyst for strategic business relationships and a source of new revenue, while creating new benefits and opportunities for students and the university community.

Intercollegiate athletic programs at major universities have generated revenue through business sponsorships and advertising for years. The top programs generate millions of dollars in revenue to support their programs. Businesses have been willing to spend significant marketing funds to have their brand associated with the programs, gain access to coaches and facilities, and have their corporate image displayed in collegiate athletic venues. Why limit these revenue-generating opportunities to athletics? The concept can be incorporated into the wider campus community, including the sponsorship revenue potential of strategic business relationships.

Some major universities are beginning to develop university-wide sponsorship programs. Early adopters include the University of California, Berkeley, the University of Kentucky, The Ohio State University, Arizona State University, and Georgia Tech. There may be others, but these universities have either designated full-time staff resources to develop a program or have contracted with one of the few companies that are focused on developing comprehensive sponsorship and multi-media programs for colleges and universities. For example, the University of California, Berkeley has added a staff person with extensive experience in sponsorship program development, while the University of Kentucky contracted with JMI Sports to develop and manage its university-wide program.

Change happens.
This emerging change will impact the way
some colleges and universities manage their business relationships. As early adopters navigate the complexities of these programs, others will follow. The leaders will have to address a number of issues and challenges that will test the viability of sponsorship programs for the long haul and for a broader number of participants. While new revenue potential from strategic business relationships can be of significant benefit to the institution, there are organizational and operational challenges to be considered. It’s important that business and executive officers understand the nature of sponsorships before embracing or dismissing them. It’s an important issue to consider on our campuses, and we need to get it right.

**What Is Sponsorship?**

It may help if we begin by stating what sponsorship is not. Sponsorship is not philanthropy, nor is it a mechanism to generate revenue by compromising the privacy of our students. Sponsorship is optimizing and monetizing the value of institutional assets. It is developing strategic business relationships and strategic partnerships that go beyond B2B transactions and/or donations.

Sponsorship intentionally links the brand of one organization to the brand of another, for the purpose of mutual benefit. Sponsorship can be developed around sustainability initiatives, campus safety and security, internships and scholarship opportunities.

Positive, Constructive Sponsorship Relationships

Successful sponsorships are mutually beneficial. The best ones are based upon shared values or opportunities to link the brand of the sponsoring entity with specific programs that meet student or institutional needs, or enable the institution to advance initiatives from a new revenue source. Sponsorships can be developed around sustainability initiatives, campus safety and security, internships and scholarship opportunities.

Sponsorships don’t have to be complicated to be effective. Here’s an example: a university experiences sudden rainstorms that can be challenging for unprepared students who need to move between buildings to change classes. The university developed a sponsored umbrella sharing program. Umbrellas bearing the logo of the sponsor are placed in academic buildings and residence halls. When students need an umbrella, they take one from the rack and deposit it in the rack at their destination. A simple concept, and the sponsor pays the university a fee for placing their image on the umbrella. Everyone wins.

Centralized Campus-Wide Sponsorship Programs Bring Challenges

Our purpose here is to highlight an emerging opportunity and to suggest that sponsorship programs can be developed in a way that contributes to the student experience while providing a new source of revenue to the institution. Change happens, but if not managed well, change can be harmful. The initial step is to determine whether...
managed sponsorships might be beneficial to your college or university. From there, it is a matter of managing the implementation.

There are a number of issues that must be understood in order to successfully implement a campus-wide sponsorship program including:

- Governance and Policy Issues;
- Operational Elements;
- Financial and Resource Issues; and
- Communication, Messaging and Campus Relationships.

For more commentary on these issues, as well as specific recommendations to consider for implementation, go to www.eandi.org/wp-content/uploads/2016/07/Sponsorship.pdf. This comprehensive article is a must-read if you’re considering a sponsorship program.

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It seems that everyone in procurement at some point gets frustrated with the repetitive, menial tasks that come along with the job. Unfortunately, there’s no shortage of them. I haven’t run a timer to check this, but I’m pretty sure I dedicate most of each day to answering my phone and replying to emails. I spend a good chunk of the rest of my time just checking off small tasks that continually seem to come in—get a copy of a PO for someone, review some terms and conditions, figure out how a supplier lost an end-user's order.

Like most of us, of course, I often would rather be doing the big exciting things. Negotiating the price on a million-dollar purchase is fun! Doing some big-picture data analysis before a quarterly supplier meeting is fresh and interesting. On the other hand, replying to the seven emails that came in while I went to pour a cup of coffee feels an awful lot like drudgery. Who wouldn’t rather work on something fresh and interesting every day, such as an important prestigious project that will have a big impact on the organization?

Of course, if that’s the attitude I allow myself, I’m going to be unhappy most of the time and feel unfulfilled in my work. Most of us are going to spend the overwhelming majority of our time doing the “menial” things. And that’s okay! Approached the right way, the small, repetitive tasks can satisfy us just as much as that exciting new project. If we approach each of those little tasks as the Important Prestigious Project, we can get a lot more out of them.

When that end-user emails me looking for help with a lost order, I can look at it as a chore or as an opportunity to do something well—right now. If I approach it as a chore, I forward that email on to the supplier with a cursory “Please advise,” and then ping the supplier every few days until the problem is resolved and I can cross this boring chore off my list. But if I approach it instead as an opportunity to spend a few minutes doing a great job, I proceed differently. I still have to accomplish the same thing (regardless of how I make it happen, the user needs to know what happened to the order!), but I can get more out of it. This is an opportunity to build a relationship with my user, by treating her/him as more than just another chore to be checked off. It’s an opportunity to engage with my supplier and to be proactive about error-proofing our processes so the problem won’t happen again. It’s an opportunity to build the reputation of my department as a group of people who are responsive, effective, and pleasant to deal with.

And of course, the big things can’t happen without the small things. Negotiating that million-dollar purchase is exciting, but I don’t get to the negotiation unless I put in my time on the preliminary and necessary small things: finding bidders, following up, answering emails, and going through numerous revisions of the specifications with my committee members. More than that, though, if I approach the small things as opportunities themselves, instead of obstacles, they won’t feel like a burden in the first place.

Small Victories

by Ryan Holliday, J.D.

University of Tennessee

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