PROMOTING PROCUREMENT

NAEP District VI Meeting
October 4-7, 2015  Tempe, Arizona

Sandy Hicks, CPPB
Associate Vice President & Chief Procurement Officer
Charlene Lydick, C.P.M.
Director of Procurement Operations
University of Colorado

FOUR CAMPUSES, ONE UNIVERSITY
Going the Denver Distance

- 13 miles to Anschutz Medical campus
- 27 miles to Boulder campus
- 69 miles to Colorado Springs campus
Myth

A job well done speaks for itself.
Baker’s Dozen
# 13 Website

https://www.cu.edu/psc/
Does your department work with independent contractors? Check out the new SOW form and procedures.

See what’s new
Contact Lists

Contact Us

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Title</th>
<th>Phone</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pam</td>
<td>Andrade</td>
<td>Assistant Small Business Liaison Officer</td>
<td>303.764.3446</td>
<td><a href="mailto:Pamela.Andrade@cu.edu">Pamela.Andrade@cu.edu</a></td>
</tr>
<tr>
<td>Cordeia</td>
<td>Angel</td>
<td>Accounting Technician</td>
<td>303.764.3401</td>
<td><a href="mailto:Cordeia.Angel@cu.edu">Cordeia.Angel@cu.edu</a></td>
</tr>
<tr>
<td>Ian</td>
<td>Best</td>
<td>Contracts Administrator</td>
<td>303.764.3451</td>
<td><a href="mailto:Ian.Best@cu.edu">Ian.Best@cu.edu</a></td>
</tr>
<tr>
<td>Mana</td>
<td>Buerman</td>
<td>Payable Services Manager</td>
<td>303.764.3454</td>
<td><a href="mailto:Maria.Buerman@cu.edu">Maria.Buerman@cu.edu</a></td>
</tr>
<tr>
<td>Robin</td>
<td>Bryant</td>
<td>Executive Assistant</td>
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<td><a href="mailto:Robin.Bryant@cu.edu">Robin.Bryant@cu.edu</a></td>
</tr>
<tr>
<td>Jennifer</td>
<td>Casanova</td>
<td>Purchasing Agent</td>
<td>303.764.3413</td>
<td><a href="mailto:Jennifer.Casanova@cu.edu">Jennifer.Casanova@cu.edu</a></td>
</tr>
<tr>
<td>Kathy</td>
<td>Chang</td>
<td>Supplier Relationship Specialist</td>
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<td><a href="mailto:Kathy.Chang@cu.edu">Kathy.Chang@cu.edu</a></td>
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<tr>
<td>Gloria</td>
<td>Chavez</td>
<td>Payable Services Team Lead</td>
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<td><a href="mailto:Gloria.Chavez@cu.edu">Gloria.Chavez@cu.edu</a></td>
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<tr>
<td>Pete</td>
<td>Ciscoo</td>
<td>Accounting Technician</td>
<td>303.764.3403</td>
<td><a href="mailto:Peter.Ciscoo@cu.edu">Peter.Ciscoo@cu.edu</a></td>
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<tr>
<td>Mike</td>
<td>Como</td>
<td>Contract Services Manager</td>
<td>303.764.3449</td>
<td><a href="mailto:Michael.Como@cu.edu">Michael.Como@cu.edu</a></td>
</tr>
<tr>
<td>Penny</td>
<td>Davis</td>
<td>Small Business Liaison Officer</td>
<td>303.764.3445</td>
<td><a href="mailto:Penny.Davis@cu.edu">Penny.Davis@cu.edu</a></td>
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<tr>
<td>Carolyn</td>
<td>DeTemple</td>
<td>Administrative Assistant</td>
<td>303.764.3411</td>
<td><a href="mailto:Carolyn.DeTemple@cu.edu">Carolyn.DeTemple@cu.edu</a></td>
</tr>
<tr>
<td>Mai</td>
<td>Duyen Ngo</td>
<td>Accountant</td>
<td>303.764.3416</td>
<td><a href="mailto:Mai.Ngo@cu.edu">Mai.Ngo@cu.edu</a></td>
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<tr>
<td>Kara</td>
<td>Finch</td>
<td>Purchasing Services Manager</td>
<td>303.764.3421</td>
<td><a href="mailto:Kara.Finch@cu.edu">Kara.Finch@cu.edu</a></td>
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<tr>
<td>Stephanie</td>
<td>Prater</td>
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<td>303.764.3410</td>
<td><a href="mailto:Stephanie.Prater@cu.edu">Stephanie.Prater@cu.edu</a></td>
</tr>
</tbody>
</table>

Related Links:
- PSC Organizational Chart

Need to Send Us Something?
- An invoice or warrant adjustment request
  - APIInvoice@cu.edu
- A request to change or cancel a purchase order
  - ChangeOrder@cu.edu
- A fax
  - 303.764.3484
Policies & Procedures

PSC Procedural Statements (PPS) provide instruction to organizational units on how to comply with University Administrative Policy Statements (APS) and other University, State, and Federal regulations. These procedures cover the areas of purchasing, payables, and travel.

- Advance Payment to Vendors
- After-the-Fact Purchases
- Alcoholic Beverages Purchased for University Events
- Business Expense Reimbursement
- Cash Advances
- Complimentary Tickets
- Gift Cards- NEW February 1, 2015
- Official Functions
- Payment Voucher/Authorization
- Personal Technology & Telecommunications
- Petty Cash & Change Funds
- Recognition & Training
- Scope of Work
- Sensitive Expenses
- Student Payments
- Study Subject Payments
- Travel
- Travel Card Handbook
- Undocumented Reimbursement
- W-9 & Vendor Authorization

Related Links

- Administrative Policy Statements (APS)
- Policy Glossary
- Accounting Handbook
Online Forms

Forms

The following forms are used to purchase or pay for items, to provide required documentation/approval for the purchase of items, or to request specific updates.

- Advance Payment to Vendors
- Approving Official Application/Update
- Cardholder Application - Procurement Card
- Cardholder Application - Travel Card
- Cardholder Update (for Procurement and Travel Cards)
- Cash Advance Setup
- Conflict of Interest Evaluation
- Delegate Authorization
- Direct Deposit Modification
- Financial Systems (FIN and CU Accounts Payable)
- Non-Employee Reimbursement
- Non-employee Travel Request for Christopherson
- Official Function
- Payment Authorization
- Personal Technology Responsibility
- Petty Cash Reconciliation
- Petty Cash/Change Fund Request
- Recognition Reporting
- RFP Information
- Scope of Work
- Ship To Location
- SPO Invoice Allocation
- Study Subject Payment
- Supplier Enablement Request
- Supplier Show Approval
- Tax Exempt Certificates
- Travel Arranger
- Vendor Enablement Request is now Supplier Enablement Request 11/1/14
- Vendor Update for Marketplace form discontinued effective 10/15/14 due to the CU Supplier Portal.
- Violation Notification

NEED TO SEND US SOMETHING?

- APInvoice@cu.edu
- ChangeOrder@cu.edu
- Fax: 303.764.3434

OTHER RELEVANT FORMS

- UHS Security Access
- Cash Receipt
- Other Finance Forms

NEED HELP?

Finance & Procurement Help Desk
Email: FinProHelp@cu.edu

University of Colorado
Boulder | Colorado Springs | Denver | Anschutz Medical Campus
Online Forms

Payment Authorization (PA)

Purpose:
Used, in accordance with the PSC Procedural Statement Payment Voucher/Authorization, to authorize payment for designated invoices when a purchase order or other commitment voucher is not applicable.

Only the items identified in the dropdown list under Payment Type, below, can be paid.

Invoice #:
Invoice Date:

Invoice #
(must be one of the following)

Payment is being made to:

Payee Information
Name:
Address:
City, State, ZIP:
Country:

Vendor ID:
Federal ID:
Employee ID:

Organizational Unit Contact Information
Organizational Unit:
Contact Person:
Campus Phone:
Campus Mailbox:
Email Address:

Warrant Handling Instructions
Warrant Delivery Code:
Vision, Mission, and Core Values

Vision
Lead the CU community as a strategic partner, providing innovative solutions that support the University's goals and objectives.

Mission
The role of the Procurement Service Center (PSC) is to support all CU campuses by applying our core values to assist customers with spend management, procure-to-pay, and travel management responsibilities. The PSC partners with CU constituents and suppliers...
#12 Professionalism

- Membership in Professional Organizations
  - NAEP
  - NIGP
  - RMGPA
  - ISM
Professionalism

• Attendance at annual meetings, classes, conferences, webinars

• Certifications
  – C.P.M. or CPSM
  – CPPB
  – CPPO

• Procurement Month
Professionalism

• Leadership Roles
  – Sandy Hicks
  – Charlene Lydick
  – Duane Tucker
  – Kathy Chang

• Award Recognition
  – NPI Achievement of Excellence in Procurement 2015
  – NAEP Excellence in Procurement 2009, 2014
Professionalism

• Publications
  – NAEP Journal
    • September 2007
    • January 2013
  – NACUBO Business Officer
    • February 2009
    • April 2015
  – Make administration aware
  – Publicize in your newsletter
POWER SHOPPING

Best-in-class procurement operations can save a bundle, but they require investment, top-level support, and broad participation.
Professionalism

• Speaking Engagements
  - Administration & campus depts.
  - NAEP & NIGP
  - Local governmental entities
  - Small Business organizations
#11 Training

• Web-based Training
  – Purchasing and Contract Management
  – Procurement Card Cardholder
  – PSC Travel
  – Fiscal Code of Ethics
About Shopping
Requestors submit requisitions within CU Marketplace, and are responsible for ensuring that requisitions $5,000 and less are accurate, appropriate, and reasonable. You finalize shopping carts, including any shopping carts you create. You are also able to receive against a Purchase Order (PO) in order to authorize payment of invoices.

There are two ways to shop within CU Marketplace: by catalog or by form. Catalogs are used to request goods from a supplier who offers CU-specific pricing. Forms are used to request goods or services when a catalog cannot be used, or to facilitate specialized business processes such as sole source justifications, Payment Voucher requests, and subcontracts.

Accessing CU Marketplace
1. Log into your campus portal.
2. Locate your CU Resources section and, under the Business Applications area, select the CU Marketplace link.

Reviewing Req/PO Status
One way to review the status of your requisitions or Purchase Orders (PO) is to use your name dropdown along the top of your screen.

Catalog Shopping
Most catalogs are known as “punch-outs,” which connect you to supplier-maintained websites custom to CU. Products selected are

Forms Shopping
A supplier must be set up in CU Marketplace before you can enter a form. If the supplier isn’t in the Marketplace, refer to the CU Supplier Portal web page for guidance.
1. From your homepage, use the CU Forms section to select the appropriate form.
2. Enter all required information (indicated by the bold field names).
3. If applicable, click the add attachments… link to attach documents that should be dispatched to the supplier with your Purchase Order (PO).
4. Use the Available Actions dropdown menu to select Add and go to Cart.
5. Click the Go button to return to your shopping cart.
6. Refer to the Finalizing Shopping Carts instructions for next steps.

Finalizing Shopping Carts
Shoppers can assign shopping carts with or without completing this information.
1. If needed, select the shopping cart. One way to do this is to use your side navigation bar to go to Shop > My Carts and Orders > View Draft Shopping Carts and select the appropriate cart.
2. Click the Add Speedtype/ShippingLine button. Missing information, such as Shipping Address, SpeedTypes, and Accounts will appear as an error at the top of the page.
3. Enter Shipping, SpeedType(s), and Account(s) as needed. Click the Save button.
4. Review the order for accuracy and appropriate information. Click the Submit Order button.

Splitting Distributions Across SpeedTypes
1. Begin finalizing the shopping cart (see above section) but do not submit.
2. On the Accounting Codes tab, click the first edit button.
3. Enter the appropriate SpeedType and Account.
4. If splitting the entire order the same:
   a. Click the Add split link.
   b. Select % of Qty (or other) from dropdown menu. Enter the split % amount.
Face-to-Face Training

• Guest Speaking to Campus Departments
  – Specialized Groups
  – Sponsored Programs
  – Research Groups
  – Program Assistant Groups
Personalized Training

• Customized
• Help Desk
  – Phone
  – Email
  – Chat

University of Colorado
Just In Time Training

Infrequent Traveler

It looks like you booked a trip in our online system, Concur. Or through our travel agency, Christopherson Business Travel (CBT).

It's been a while and things have changed... so here's a heads-up on a few things you'll want to know.

Tell me more!

Go back
Just In Time Training

Infrequent Traveler Email Messages
Jan 23, 2015 thru June 30, 2015

<table>
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<tr>
<th></th>
<th>Booking Trip</th>
<th>5 Days Before Trip</th>
<th>End of Trip</th>
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#10 Survey Says

• Customer Satisfaction
• Supplier Feedback
• Technology
FY15 Customer Surveys

PSC Satisfaction Survey
- Responses - 1382
- Overall Satisfaction Rating – 80%

CU Marketplace Survey
- Responses – 764
- Overall Satisfaction Rating – 84%
FY15 Customer Surveys

CONCUR TRAVEL & EXPENSE SURVEY

- Responses - 869
- Overall Satisfaction Rating for Concur Travel - 81%
- Overall Satisfaction Rating for Concur Expense - 81%
- Satisfaction Rating with 2014 Enhancements - 82%
- Overall Satisfaction Rating for Christopherson Business Travel - 84%
**March 15, 2005**

**TSM News: Make Way for the New Way to Process W9s**

The TSM liaison announced that new functionality will allow even more access to the Supplier Portal.

Beginning May 1, 2005, all new suppliers will register with the Supplier Portal. This includes international entities/individuals, universities, and state/local governments, and hospital/healthcare providers.

One exception: students/graduates/PhD hopefuls. There will continue to use a paper W9. (The Signed Subject Payment Form must accompany the W9 to ensure individual accountability in the National Tax Register.)

What does this mean for you? If you are still working with a new supplier, you will need to invite them to register through the Supplier Portal. See step-by-step instructions to do this available on the PSC site.

Who is a supplier?

Any external entity or individual paid by CU is considered a supplier. CU employees and students are not considered suppliers.

Virtual to TSM

Total Supplier Manager (TSM) assists in capturing important information about suppliers before issuing W9s or processing payments. This registration process, commonly referred from the Supplier Portal, ensures we get all the right information the first time.

Questions? Contact PinProHelp@cu.edu.

**PinProHelp News**

**Noon Hour Service**

Many departments have told us they would like to be able to contact the Finance & Procurement Help Desk (PinProHelp) over the noon hour. We are pleased to be able to offer continuous service between the hours of 10 a.m. and 3 p.m. on normal business days. That means non-stop assistance with travel, purchasing, payroll, finance, and job placement questions!

So give us a call (303-735-6430) and let us know we're here.

**Expanded Chat**

Move your lunch to the PinProHelp Chat Page. Don't drink milk and initiate a live chat with the Help Desk consultant. Now there's more Chat to love since we have the line available most of the day on normal business days. So go ahead... Launch a chat session!

**Town Halls Coming in April**

Get up to date on PSC happenings at a Town Hall. Registration is open now:

- **1010 Grant Street** - April 7
- **Anschutz Medical Campus** - April 15 and 21
- **Boulder** - April 22 and 28
- **Denver** - April 22
- **UCO** - April 25

**Procurement Month Proclamation**

We are delighted that the Governor has once again officially declared March "Government Procurement Month." His proclamation recognizes the role played by procurement professionals in promoting government efficiency and effectiveness.

We encourage you to celebrate all procurement personnel — in your office and in your community. Make sure they see the March 2005 Government Procurement Month proclamation... and thank them for their service.

**CCI Fiscal Year-End Sale**

Colorado Correctional Industries (CCI) is having a fiscal year-end sale, now through June 30. Discounts — up to 50% — are identified in the following offer codes:

- **Business Solutions: Order these sales items through the CU Marketplace.**

**Other questions? Contact your CCI representative:**

- **Primary: Dave Dankor**
  - Phone: 303-799-2000
  - Mobile: 303-490-1457
- **Secondary: Joseph Sanchez**
  - Phone: 303-799-2000
  - Mobile: 720-293-0972

**Anschutz Medical Campus and Colorado Springs:**

- **Primary: Joseph Sanchez**
  - Phone: 303-799-2000
  - Mobile: 720-293-0972
- **Secondary: Dave Dankor**

**FYE Purchasing Deadlines from CCI**

Need to receive and purchase all office furniture from Colorado Correctional Industries (CCI) before June 30? If so, you'll want to check out CCI's fiscal year-end information.

**Note:** disregard the memo's instructions for placing your order. All CCI orders are placed through the CU Marketplace.

**Questions? Contact your CCI sales rep:** Dave Dankor or Joseph Sanchez (contact info in CCI State article, above). Or contact PSC Purchasing Agent Deidra G. Keizer at Deidra.Keizer@cu.edu.

**Save the Date!**

Join us for the 4th annual Hospitality Expo on the Anschutz Medical Campus:

- **May 5, 10:00 a.m. - 3:00 p.m.**
- **Bingham Conference Room**

**We want to ‘CU there! Questions? E-mail:** PinProHelp@cu.edu.

**Open House Reminder: Two to Go**

We've had a great turnout for the first two Open Houses — at Boulder and the Anschutz Medical Campus. These are two more PSC Open House events coming up, at UCO and CU Denver/CU System. To register: psc@aurorahq.com or openhouse.

**Questions? Contact Dina.Keiser@ucdenver.edu.**

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[University of Colorado]

**Boulder | Colorado Springs | Denver | Anschutz Medical Campus**
President Benson
Awards 2015
Awards 2015

Staples was CU’s first strategic partner. During the many years we’ve done business together, Staples has consistently provided exemplary customer service and brought cost-saving ideas to our partnership. Staples has transformed from a traditional office products company to one which provides sustainable cleaning products and equipment, promotional products, and cutting-edge technology. Throughout their transformation, however, the Staples team has always remembered that customer service is their number one priority.
Awards 2015

I am proud to present the *Princess Cinderella Award* to Staples. If Cinderella had only had the Staples Sustainable Earth Brand products, she would have finished her chores lickety split and had time to take online classes to finish her college degree so she could start a palace cleaning business. Then she would have met the prince at a business review instead of at the ball. But they still would have lived happily ever after.
#7 Supplier Orientation

- Monthly Meetings
- Community Outreach
- 1600+ attendees
#6 Promotional Videos

Thanks....
Department Response

http://procurementservicecenter.you.are.mighty.aninote.com/
What are people sayin’…

“Thanks for the introduction to your team, Sandy. Looked like great fun to make. Thanks, also, for the exceptional, efficient and effective work you and your team do every day. You and your team make CU proud!”

Kyle Hybl, University of Colorado Board of Regents

“That was a lot of fun. Thanks for sharing. I work with the group that designs MOOCs and other video based learning at CU Boulder. I enjoyed getting to see a group on campus enjoy working on a video project. The concept was original, and well done. Also, I had no idea how big your group is!”

Cory Pavicich, Academic Technology Consultant
Office of Information Technology, Boulder Campus

https://www.cu.edu/psc/meet-psc

• 177 comments
• Over 3500 Views
#5 Townhalls

- Twice yearly on each campus
- Policy Changes
- System Changes
- Survey Results
#4 Metrics

- Know your audience
  - Customize
    - Detailed or High Level
  - Format
    - Spreadsheet or Graphic
Procurement Service Center

Performance Metrics for Fiscal Year 2014

University Spend - FY 2014

$923,163,000

30% of all CU expenditures flowed through the PSC.
Purchase Order Process Time Was Slashed

Thanks to the efficiencies of CU Marketplace, 93% of all purchase orders are now completed in one day or less.

- 0 Days (89%)
- 1 Day (4%)
- 2-5 Days (4%)
- 6+ Days (3%)
CU Marketplace Catalog Orders Went Up

Catalog orders increased to 73%, up from 71% the prior year.

Benefits of Catalog Orders

Streamlined Ordering
Guaranteed CU Pricing
Automated Invoicing
Suppliers Embraced Electronic Invoices

Electronic invoices jumped by 5% in just one year.

Benefits of Electronic Invoicing

- Faster
- More Accurate
- Less Paper

52% 47%
Concur Travel & Expense Accelerated Reimbursements

The number of hours required to process expense report reimbursements was **CUT IN HALF!**

Now, employees get their money within one business day.
#3 PSC Open Houses

- March is Procurement Month
- Include 7 strategic suppliers
- 400+ attendees
WHEREAS, governmental purchasing organizations in the State of Colorado are committed to the highest ideals of honor and integrity in order to merit the respect and confidence of state, municipal, county, special district, higher education, school district, or other local area government agencies, and the public which they serve, and

WHEREAS, Colorado provides an environment where all organizations are afforded an equal opportunity to compete for business within the state, municipal, county, special district, higher education, school district, or other local area government agencies; and

WHEREAS, governmental purchasing organizations are to be commended for their diligent pursuit of efficiency in the operation of government through their commitment to seeking goods and services of the highest value in terms of quality and price to maximize the benefits provided to the citizens of this state;

Therefore, I, John W. Hickenlooper, Governor of the State of Colorado, do hereby proclaim March 2013 as

GOVERNMENT PURCHASING MONTH

In the State of Colorado.

GIVEN under my hand and the Executive Seal of the State of Colorado, this first day of March, 2013

John W. Hickenlooper
Governor
Welcome & Registration
Ready, Set, Go
Strategic Suppliers
Always Have Fun!
Always Have Fun!
#2 Department Scorecards

Procurement Analysis Scorecard

Department X
Boulder Campus

Analysis Through Q4, 2015
Generated 7/24/2015

Powered by Tableau

University of Colorado
Boulder | Colorado Springs | Denver | Anschutz Medical Campus
Procurement Summary

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<th>FY 2015</th>
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<td>FY 2015</td>
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<tr>
<td>FY 2015</td>
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<th>Spend on Procurement Card</th>
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<td>FY 2014</td>
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<tr>
<td>FY 2014</td>
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<tr>
<td>FY 2015</td>
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<td>FY 2015</td>
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Key Trends

- % Catalog Usage
- Unique Marketplace Users
- Spend on Procurement Card

Payments by Quarter
Spend

**Spend, By Transaction Source**

**Top Spend by Category (Marketplace)**

- Telecommunications / AV: 42.4%
- IT Hardware & Maintenance: 27.4%
- Scientific / Laboratory / Medical Equip. & Supplies: 19.3%
- Office / Classroom Supplies & Equipment: 7.1%
- Furniture: 1.9%
- Professional Services & Training: 1.2%
- Facilities Related Supplies, Materials & Services: 0.2%
- Books, Subscriptions & Library Services: 0.1%
- Construction Materials & Services: 0.0%
- Athletics, Apparel & Equipment: 0.0%

**Top Suppliers - Previous FY (AP³)**

- University Corp for Atmospheric Research: $101,859
- AgentSheets Inc: $81,779
- Apple Computer Inc: $31,488
- Shodor Education Foundation Inc: $36,728
- JC Technology Inc: $38,526
- Career & Technical Training LLC: $25,260
- DellMarketing LP: $15,481
- University Of Missouri: $13,332
- CDW Government LLC: $12,952

**Top Suppliers - Current FY (AP³)**

- University Of Missouri: $114,250
- AgentSheets Inc: $57,513
- Apple Computer Inc: $50,070
- Columbia University: $58,949
- Dell Marketing LP: $46,674
- Kinova Inc: $34,700
- University Corp for Atmospheric Research: $30,326
- Shodor Education Foundation Inc: $28,614
- Laura Rassbach de Vesme: $18,525
- Mayflower Transit LLC: $17,617

*Denotes Spend Under Management*
Managed Spend

Managed Spend

Top Spend with Managed Suppliers

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<th>Supplier</th>
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<td>$8,952</td>
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</tbody>
</table>

Purchasing Process

<table>
<thead>
<tr>
<th>Category</th>
<th>Number of POs</th>
<th>% of POs</th>
<th>PO Tot Amount</th>
<th>% of PO Total Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Catalog - No Competition Required</td>
<td>95</td>
<td>77.9%</td>
<td>$136,192</td>
<td>46.5%</td>
</tr>
<tr>
<td>Department Purchasing Authority</td>
<td>16</td>
<td>13.1%</td>
<td>$17,479</td>
<td>6.4%</td>
</tr>
<tr>
<td>PSC Facilitation</td>
<td>10</td>
<td>8.2%</td>
<td>$113,854</td>
<td>41.5%</td>
</tr>
<tr>
<td>Existing Campus Agreement</td>
<td>1</td>
<td>0.8%</td>
<td>$7,304</td>
<td>2.6%</td>
</tr>
<tr>
<td>Grand Total</td>
<td>122</td>
<td>100.0%</td>
<td>$274,528</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

Table reflects last 12 months. Excludes Procurement Card.
Marketplace Users

Top Users by PO Count - Previous FY
- Ann Smith
- Joe Smith
- Mary Smith
- Jim Smith
- Sara Smith
- Mike Smith

FY 2014

Top Users by PO Count - Current FY
- Ann Smith
- Joe Smith
- Mary Smith
- Jim Smith
- Sara Smith
- Mike Smith

FY 2015

Top Users by PO Value - Previous FY
- Ann Smith
- Joe Smith
- Mary Smith
- Jim Smith
- Sara Smith
- Mike Smith

FY 2014

Top Users by PO Value - Current FY
- Ann Smith
- Joe Smith
- Mary Smith
- Jim Smith
- Sara Smith
- Mike Smith

FY 2015
Marketplace

TCP Catalog Supplier Usage

- Staples Contract & Commercial Inc.: 10
- Apple Computer Inc.: 8
- Colorado Constructional Industries: 6
- Bell Marketing LP: 4
- NULL: 2
- CDW Government LLC: 1

% Catalog Usage

- FY 2013: 15%
- FY 2014: 34%
- FY 2015: 43%

Item Type Usage

<table>
<thead>
<tr>
<th>PO Item Type</th>
<th># Lines (Inception)</th>
<th>% of Lines (Inception)</th>
<th># Lines (12 Mos.)</th>
<th>% of Lines (12 Mos.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Catalog</td>
<td>1,000</td>
<td>100.0%</td>
<td>325</td>
<td>100.0%</td>
</tr>
<tr>
<td>Non-Catalog Form</td>
<td>78</td>
<td>6.4%</td>
<td>22</td>
<td>0.2%</td>
</tr>
<tr>
<td>Payment Voucher</td>
<td>62</td>
<td>6.9%</td>
<td>3</td>
<td>0.8%</td>
</tr>
<tr>
<td>Sales Source</td>
<td>8</td>
<td>0.7%</td>
<td>4</td>
<td>1.1%</td>
</tr>
<tr>
<td>After the Fact</td>
<td>0</td>
<td>0.0%</td>
<td>0</td>
<td>0.0%</td>
</tr>
<tr>
<td>SPO - Encumbered</td>
<td>5</td>
<td>0.4%</td>
<td>0</td>
<td>0.0%</td>
</tr>
<tr>
<td>SPO - Sponsorship</td>
<td>9</td>
<td>0.8%</td>
<td>0</td>
<td>0.0%</td>
</tr>
<tr>
<td>SPO - Construction</td>
<td>0</td>
<td>0.0%</td>
<td>0</td>
<td>0.0%</td>
</tr>
<tr>
<td>Grand Total</td>
<td>1,140</td>
<td>100.0%</td>
<td>254</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

Avg. Lines Per PO

- FY 14 Q1: 5.0
- FY 14 Q2: 4.5
- FY 14 Q3: 4.0
- FY 14 Q4: 3.5
- FY 15 Q1: 3.0
- FY 15 Q2: 2.5
- FY 15 Q3: 2.0
- FY 15 Q4: 1.5
Procurement Card Users
Procurement Card Analysis

- Percentage of Spend on Card
- Percentage of Transactions on Card

Top Merchants by Card Transactions:
- Amazon
- Amazon Marketplace PMTS
- Instant Imprints
- The Computing Research
- UMC Catering
- FedEx Office 00004143
- IEEE CB Conference
- www.newegg.com
- Front Range Catering Inc
- Bristlecone Jubilation
- www.makerbot.com
- MCMASTER-CARR

Table reflects last 24 March.
## Analysis Scope

### PeopleSoft Organizations with External Spend

<table>
<thead>
<tr>
<th>Organization Number(s)</th>
<th>Number of Records</th>
</tr>
</thead>
<tbody>
<tr>
<td>10344</td>
<td>6,357</td>
</tr>
<tr>
<td>10345</td>
<td>815</td>
</tr>
<tr>
<td><strong>Grand Total</strong></td>
<td><strong>7,172</strong></td>
</tr>
</tbody>
</table>

### Departments With Marketplace Activity

<table>
<thead>
<tr>
<th>Department</th>
<th>Number of POs</th>
</tr>
</thead>
<tbody>
<tr>
<td>10344-Computer Science</td>
<td>478</td>
</tr>
<tr>
<td><strong>Grand Total</strong></td>
<td><strong>478</strong></td>
</tr>
</tbody>
</table>
For assistance with this analysis, please contact:

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University of Colorado, Office of the President  
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Phone: (303) 764-3410 | Email: departmentscorecard@cu.edu  
http://www.cu.edu/psc

Notes

1. **Spend Under Management** - The spend impacted by contracts directly negotiated by Procurement, spend as a result of solicitations conducted by Procurement, and/or spend managed by a defined category strategy that involves Procurement oversight.

2. **Marketplace** - The CU Marketplace is a purchasing and payment-processing system that enables online shopping, including CU-specific catalogs.

3. **AP** - Analyses marked AP are based on spend data from the accounts payable process in PeopleSoft.

4. **Managed Suppliers** - Suppliers with whom spend under management transactions are conducted. The PSC manages the contractual relationship with these suppliers.

5. **Top Catalog Suppliers Usage** - Catalog suppliers are those whose items are featured in a Marketplace catalog, allowing users direct access for ease of shopping. This analysis lists the top catalog suppliers utilized in the last 12 months.
#1 Supplier Showcases
Giveaways - Go Buffs!
UCCS – Mtn Lions
Networking Opportunities
Networking Opportunities
Other Departments

- Internal Audit
- Controller
- Policy
- Risk Mgmt
- Help Desk
Supplier Interaction
Puppy Love