Procurement FYI Forum – Contracts Update

09/17/13
Agenda

Opening Remarks – Ben Moreno (Chief Procurement Officer)

Contract Lifecycle Optimization Project – Michael Torr (Process Improvement Specialist)

Question and Answer – Ben Moreno, Troy Sutton (Contracts Manager), Michael Torr
Procure to Pay Organization – Current Support Model

Spend Data Analyst (1) Harita Shah

CPO

Admin (1) Roxanne Blackwood

Procurement (1)

Payment Services (1)

Purchasing (8)

Contracts (10)

Accounting Op (3)

AP, Tax, SE (5)/(1)/(2)

T&R / Cards (7)/(4)

= Number of Employees
Project Summary

- Started in February 2013

- Goals
  - Decrease cycle time and create process consistency

- Why are we doing this project?
  - Processes are inconsistent and don’t always meet client needs
  - Improving processes will lay the foundation for a longer term technology solution

- Approach
  - Collaborate with Contract Advisors and clients* to identify opportunities for improvement
  - ~30 opportunities for improvement were identified

- Where we are today?
  - Opportunity list was narrowed down and the team is in the process of implementing three improvements

*Note: Four clients interviewed for this project (Land Buildings & Real Estate, School of Medicine, Residential & Dining Enterprises, Student Affairs)
Implementation Status (Three Improvements)

1. **Improved contract status tracking**
   a) The Contract Status section on the Oracle “query” screen has been enhanced to provide more clarity around the status of incomplete Purchase Orders that require a contract.
   b) Implementation: week of 9/23

2. **Streamlining contracts**
   a) Will speed up processing of purchase orders less than $25,000 by switching from a paper model to an electronic model.
   b) Administrative System development is underway
   c) Anticipated implementation: 10/13

3. **Role clarification**
   a) Clarifying internal roles and responsibilities within the Contracts Team

None of these improvements will require campus users to do anything differently when submitting a requisition for a contract. They should make the process faster, easier and more consistent.
Project Next Steps

- Campus will receive communication regarding the implementation of improvements #1 and #2 from slide 6
- After implementation of improvements #1 and #2 we will follow-up to get your feedback on the improvements
- The project team will study how and when to implement other opportunities for improvement in the contracts process. We'll keep you posted.
Question & Answer