

Procurement Quarterly



YEAR ONE: FISCAL YEAR 2017

LSU Procurement completed its first fiscal year in Workday without a hitch. Below is a summary of that accomplishment:

- ⇒ **31,022** Requisitions created
- ⇒ **30,342** Purchase Orders created
- ⇒ **22,625** Suppliers created



As we continue to launch e-Commerce systems, we anticipate new supplier catalogs for the following suppliers/commodity groups by the end of the year:

- ⇒ America To Go (Catering Services)
- ⇒ Fisher Scientific (Research & Scientific Supplies)
- ⇒ McKesson (Medical & Surgical Supplies)
- ⇒ Medline (Pharmacy & Medical Supplies)
- ⇒ SKC Communications (Audio Visual Installation)
- ⇒ United Rentals (Moving & HVAC Equipment Rentals)

2017 PROCUREMENT SUMMIT



Procurement will host a summit on September 27th and 28th at the Lod Cook Alumni Center. The event will be held from 8:00am to 4:00pm each day with a vendor show and learning sessions throughout the day. We have gathered together our team of Procurement professionals along with many others to discuss key purchasing topics.

Session at the Procurement Summit will include: Workday Tips and Tricks; Sole Source Purchases; Methods of Procurement; Professional, Specialty and Consulting Services; Risk Management and Insurance; Contracts 101 and more.

The Procurement Summit is expected to welcome more than 200 procurement professionals representing each LSU entity (LSU A&M, LSU AgCenter & Research Stations, LSU-Alexandria, LSU-Eunice, LSU-Shreveport, Pennington Biomedical Research Center, LSU Health Science Center-New Orleans, LSU Health Science Center-Shreveport, LSU Health Care Services) and special guests from other Universities across the State with the goal of bringing buyers and sellers TOGETHER.

Sessions to be listed on the [Procurement Summit](#) webpage soon.

Announcements

ATTENTION: PURCHASING AGENT DELEGATES



Effective September 1, Procurement will be implementing a “Purchasing Agent Certification” program to replace the current Purchasing Agent Delegation process. The certification program will provide annual training opportunities to those individuals tasked with the day-to-day procurement activities with on-going training requirements to maintain delegation.

Delegates are encouraged to attend the Procurement Summit where training courses will be offered which meet the certification requirements. An email with more information about the revised process will be sent to the delegate directly in the next few weeks.

All current delegates must re-certify for delegation & attend mandatory training courses.

Procurement invites you to the Grainger Primary Contract Vendor Expo which will be held in the Pete Maravich Assembly Center –Upper Concourse Area on Thursday, November 9, 2017 from 9:00AM—2:30PM. Over 30 manufacturers with product displays will be present!! Catering & door prizes to be provided. For questions, contact Kyle Harper, Grainger Rep, at 225-315-0899 or Stephen Walczak, LSU Procurement, at 225-578-2303.



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Supplier Diversity

LSU is committed to fostering an inclusive environment by providing Diverse Businesses opportunities to participate in University contracts. In support of this commitment a Supplier Diversity program will be launched on August 1, 2017. The initial goal of the program is to strengthen, align and connect with Louisiana’s minority (MBE) and women-owned (WBE) business enterprises. Creating opportunities for these groups of small businesses will result in a meaningful economic impact for Louisiana State University and the Baton Rouge community.

Career opportunities will be posted soon to hire a Specialist and a Manager level positions.

For more details on the Supplier Diversity program, please contact [Mark Barcia](#) at 578-2285.



Advertising

Advertising purchases require approval from Strategic Communications or Human Resources (for employment ads) and Procurement **prior** to any ad placement.

Advertising Process

1. Department determines that there is a need for an advertisement.
2. Department obtains approval from Strategic Communications or Human Resources. *Human Resources approval is only needed if the advertisement is for an employment opportunity.*
3. Department obtains supplier quote or insertion order. ***If signature is required by LSU on any document, it cannot be signed by the Department. It must be routed to Procurement for signature.***
4. Department submits to Procurement a complete package consisting of the following:
 - Approval from either Strategic Communications or Human Resources, supplier quote/price source, any applicable contract, a draft of the advertisement copy (or a statement of the purpose of the ad).
 - If the total cost of the advertisement will be greater than \$10,000, a purchase order is required. A requisition should be submitted to Procurement Services (Buyer: Jessica Price), with the above items attached.
 - If the total cost will be less than \$10,000 and is within the cardholder’s delegated authority, an email request for approval to proceed via Lacarte can be sent to jprice1@lsu.edu. One email request should be submitted, with all items listed above attached to the single email.
5. Procurement reviews the information provided by the department, negotiates contract terms and conditions with suppliers (if applicable), and issues either the purchase order or LaCarte approval.

University Cost Savings

During the 2017 fiscal year, LSU Procurement has strived to create efficiencies and savings across all campuses. Utilization of the master contract catalogs set up in Workday created hard and soft savings for the university. Hard cost savings is directly related to the cost of the good or service provided. Soft cost savings are through efficiencies created in the process, allowing LSU employees to focus their efforts on other projects and tasks rather than shopping for lower prices.

Master Contract Total Spend - \$ 12,898,693.07

- Master Contract Hard Cost Savings - \$ 2,552,623.93
- Master Contract Soft Cost Savings* - \$ 1,197,687.00
- VWR International 2% in Free Product - \$ 44,175.48

Total Savings - \$ 3,794,486.41 (29.4%)



**LSU Procurement uses industry benchmarks of \$87 per traditional purchase order and \$23 per electronic purchase order (punch-out) to calculate soft cost savings.*

Additionally, **\$ 22,757,345.74** in goods and/or services were requested to be procured in Workday this fiscal year. Procurement Buyers conduct competitive solicitations to ensure the university is getting the best value which created **\$480,863.10 (2.1%)** in savings for the university.

Workday Procurement FAQs

In an effort to provide the answers to some of the most frequently asked Procurement related questions, Procurement Services has developed a FAQ webpage on our website (Workday—Procurement FAQs). This webpage is continuously updated as repeat questions or issues are resolved.

Visit our [FAQs page](#) to view the list of questions and answers on topics such as:

- ⇒ Cancelling/Closing Purchase Orders
- ⇒ Deleting or Copying Requisitions
- ⇒ Ship To Address Errors
- ⇒ Finding and Changing Purchase Orders



Procurement Reminders

- ◆ LSU has a new customs broker in place for international shipments. To view the customs broker information, click [here](#).
- ◆ A requisition title can be added in the internal memo section of the requisition to help identify the purchase/contract and aide in procurement reporting.
- ◆ Alternate/Ad Hoc addresses **cannot** be used on requisitions that require an RFQ (solicitation). The 'Shipping Address' must be selected from the list of shipping addresses loaded in Workday.
- ◆ LSU Departments must purchase business system items from the master contract supplier, Printing Tech of B.R. Approval to deviate from the master contract and purchase from another supplier must be obtained PRIOR to the purchase from Strategic Communications at approvals@lsu.edu.

Contracting Services Tips

- ◆ The information provided in the PUR-CR form must be obtained from the supplier and should never be a best guess or assumption. Information received on the PUR-CR is closely reviewed and scrutinized to identify potential conflicts of interest in order to determine if LSU can contract with the supplier.
- ◆ Individuals who have left the university within the last 2 years are prohibited from being contracted as an independent contractor to perform services for LSU.
- ◆ LSU employees who are business owners and wish to contract with LSU to provide goods and/or services are hereby reminded that outside employment must be approved annually in accordance with [PM-11](#) AND obtain approval annually to contract with the university in accordance with [PM-67](#).
- ◆ The contract start & end date must be identified on all contracted service lines. Also, the date services were rendered must be identified in the line memo field of the receipt in order to process the supplier invoice for payment.



Did you know?

Property Management

Inventory Deadlines

Each department should be nearing the completion of Phase 1, which is a complete scan of all assets in the department's building (s). Once Phase 1 is complete, a more targeted search can begin during Phase 2 for any assets not located during Phase 1. Property Management recommends staying on track with these dates to ensure a complete and thorough inventory is completed prior to the departmental certification process.

2017 Key Inventory Dates

August 15 "Soft" Deadline for Completion of Phase One

October 16 "Soft" Deadline for Completion of Phase Two

October 31 Deadline for Certification (Phase Three)

Property Management would also like to reiterate the importance of inputting all assets in a physical location, including any assets that you scan or come across that do not belong to your department. This will aid other departments in tracking their assets located in your department's building (s).

When you come across an asset that is not on your filtered list, please make sure to verify that the LSU tag number has been correctly entered (if manual entry). Once verified, select "yes" to complete the inventory process of that asset.

Please contact [Property Management](#) if you need additional assistance with the inventory process.



Updated Staff Directory

Sally A. McKechnie

Assistant Vice President for Procurement & Property Management
Chief Procurement Officer

225-578-2307
smckechnie@lsu.edu

Mark J. Barcia

Associate Director

Procurement Administration; Supervision of Contracting Staff and Student Workers

225-578-2285
mbarci2@lsu.edu

Michele M. Montero

Associate Director

Complex Request for Proposals (RFPs) and non-routine ITB's for Procurement of Goods and Operating Services, Supervision of Construction & Procurement Staff (Buyers)

225-578-2306
mmorr12@lsu.edu

Barbara H. Lewis

Assistant Director

Professional, Specialty, and Consulting Services Contracts and Cooperative Endeavor Agreements Administration; Request for Proposals (RFPs) and non-routine ITB's for Contracting Services; Real Property Rentals and Leases; Supervision of Contracting Staff

225-578-2035
barabaralewis@lsu.edu

Tiffany N. Robinson

Business Development Manager

Workday Procurement Administrator; Procurement and Workday Training Supervisor; Procurement Security Access Data Steward; Newsletter; Website Management; MBE/WBE Reporting; Supervision of Supplier Management & Strategic Sourcing Staff

225-578-2739
tcart12@lsu.edu

Stephen D. Walczak

Strategic Sourcing Analyst

Strategic Sourcing & Spend Analysis; Supplier Website Error, Delivery & Supplier Issues

225-578-2303
swalczak@lsu.edu

Procurement Staff

Alexandra T. Huber

Buyer

Appliances, Automotive equipment and supplies; Boats and Marine supplies; Furniture; Fuel; Charter Services

225-578-9398
atorre6@lsu.edu

Jamie P. Maddie

Contract Specialist

Professional, Specialty and Consulting Services Contracts/Amendments; Cooperative Endeavor Agreements; Sales of Service; Revenue Generating/Sharing Contracts/Amendments

225-578-7552
jphil41@lsu.edu

Allison B. Lansing

Buyer

Artwork; Audio/Visual equipment and supplies; Catering; Conference/Meeting & Facility Rentals; Courier/Freight Services; Food; Office, School, Library Equipment & Supplies; Paper; Printing Equipment, Services & Supplies; Publications & Copyrighted Materials; Promotional Items; Uniforms

225-578-2290
alansing1@lsu.edu

Cynthia S. Winey

Contract Specialist

Professional, Specialty and Consulting Services Contracts/Amendments; Cooperative Endeavor Agreements; Sales of Service; Revenue Generating/Sharing Contracts/Amendments

225-578-1053
cwiney@lsu.edu

Amy H. Bourgeois

Buyer

Construction/Renovations Projects; Laboratory/Research/Clinical/Biomedical/Environmental/Nuclear, etc., supplies, equipment & services; Lab and drug testing; Hospital and Laboratory Gases; Pharmaceuticals; Police/Safety Equipment; Safety Equipment & Supplies; Veterinary Equipment & Supplies; Water Treatment Chemicals

225-578-8651
ahill5@lsu.edu

Jessica L. Price

Contract Specialist

Professional, Specialty and Consulting Services Contracts/Amendments; Advertising Contracts/Agreements; Art Museum Agreements; Software & Subscription Services and Implementation

225-578-2097
jprice1@lsu.edu

Support Staff

Barbara A. Daniel

Administrative Coordinator

Receptionist; Office Mail Distribution; State Contract Purchases under \$50,000; Professional, Specialty & Consulting Purchases less than \$2,000

225-578-2176
bdanie4@lsu.edu

Jene' T. Ledet

Buyer

Athletic equipment & supplies; Brand Name products; Fitness equipment & supplies; IT Purchases (Computer Hardware etc); Moving/storage; Music equipment & supplies; Security Services; Telecom equipment & services; Telecom Manpower; Vehicles

225-578-5510
jenededet@lsu.edu

Linda F. Hebert

Administrative Coordinator

Supplier Enrollment & Maintenance; Public Bid Openings; Newspaper/LaPAC Bid Posting

225-578-2301
lhebert@lsu.edu

Charlotte Newman

Buyer

Agricultural equipment & supplies; Elevator Maintenance; Garbage Disposal Services; Grounds Equipment, Supplies & Maintenance; Heavy Construction Equipment; Supplemental Manpower Contracts; MRO Equipment, Tools & Supplies; HVAC equipment & supplies; Laundry Services; Pest Control; Janitorial services & supplies

225-578-2304
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Rose B. Bourg

Administrative Coordinator

Procurement Support Services; Business System Purchases; State Contract Purchases under \$50,000

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rbourg@lsu.edu

Sharday D. Warner

Buyer

Construction/Renovations Projects

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Stefanie Kirkwood

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Assistant to the Assistant Vice President for Procurement; Caterer Licensing

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This newsletter is posted at <http://www.procurement.lsu.edu> and emailed to Procurement Training Attendees, Department Purchasing Agents, Business Managers and those who have requested to be added to the email distribution list. To request addition to deletion from this list, contact Tiffany N. Robinson.