Source2Pay Project

Process – Purchase Methods Not Requiring a Solicitation

Current State

Focus Group Meeting

October 25-27
Agenda

- Welcome
- Introductions
- Source2Pay Project Overview
- Project’s Process Details
- Process Current State
- Current State Identify Issues
- Next in the project’s process
- Questions
Welcome!

- Introductions
  - Name
  - Department
  - Current Job
  - Goal for being participating on a Focus Group
Source2Pay Project

- Our current source-to-pay procedures at the University has significant opportunities for improvement and impact every department within the University system.
Project Purpose/Goal

- Identify process improvements throughout source to pay process
- Develop RFP
- Ultimate goal is to minimize, improve & standardize IT platforms
Project Process

- Capture Current State
  - Map process
  - Current state document
  - Present to campus in focus group setting
  - Present feedback to the team
  - Finalize current state
  - Present to Director Council
Project Process

- Create Future State
  - Map process
  - Identify Issues
  - Brainstorm recommendations
  - Present to campus in focus group setting
  - Present feedback to the team
  - Finalize proposed solutions
  - Present to Director Council
Purchase Methods Not Requiring a Solicitation - Current State

- Small Purchase
- Small Purchase Professional and Artistic
- Sole Source
- Sole Source Economically Feasible
- Exemption
- Emergency Purchase
- Quick Purchase
Start and End Points

- Starts when Purchasing receives a Requisition request that meets one of these criteria
- Ends when Purchasing has reviewed and agrees that the Requisition meets the requirements for that Purchase Type
Process Steps?

- 1. Receive Requisition
- 2. Review
- 3. Approval
- 4. Finalize
Small purchase

- Definition: To allow departments to obtain goods and services with minimal administrative oversight up to the small purchase limit
  - Forms?
  - Pre-approval processes?
Small Purchase-Professional and Artistic

- Definition: Transparency for small P&A purchases with no need for informal solicitation but to ensure posting to the Bulletin

- Ex:
  - Law
  - Accounting
  - Dentistry
  - Medicine
  - Psych
  - Custom produced art
Sole Source

- **Definition:** When only one vendor can fulfill the need for the specifications of the purchase, or if there is a grant requirement specifying the purchase source
  - **Forms**
    - BOT Recommendation
    - Others?
  - Pre-approval processes?
Sole Economically Feasible Source

- Definition: Due to large variance in price that vendor with no expectation of reduction, previous investment and knowledge of product
  - Ex: Banner module
    - Forms
      - BOT Recommendation
      - Others?
    - Pre-approval processes?
Exemption

- **Definition**: Procurement code allows for purchases meeting certain requirements to be exempt from most procurement rules

- **Ex**: Dierks Bentley concert at State Farm Center
  - Forms?
  - Pre-approval processes?
Emergency Purchase

- Definition: Critical operational needs in matters of safety and health
- Ex: Flooding of basement
  - Forms
    - EMERGENCY PURCHASE AFFIDAVIT
    - Others?
  - Pre-approval processes?
Quick Purchase

- Definition: Limited window of opportunity to make the purchase
  - Ex: Refurbished MRI machine bought from same vendor as before
    - Forms?
    - Pre-approval processes?
Current State

Issues with the current process?
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Next Steps

- Present feedback to Project’s process Team
- Finalize current state
- Begin future state
- Present future state to each campus
Contact Information

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Thank YOU!