Source2Pay Project

Process – Purchase Methods Not Requiring Solicitation
Future State
Focus Group Meeting
December 6-8, 2016
Agenda

- Welcome
- Introductions
- Current State Process Overview
- Current State Identified Issues
- Future State Recommendation
- Next in the project’s process
- Questions
Welcome!

- Introductions
  - Name
  - Department
  - Current Job
  - Goal for being participating on a Focus Group
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Current State Overview

- Small Purchase
- Small Purchase Professional and Artistic
- Sole Source
- Sole Source Economically Feasible
- Exemption
- Emergency Purchase
- Quick Purchase
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Future State Overview

How did we get here?
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Future State Overview

- Grouped Issues and Recommendations into Categories
  - State/Regulatory
  - Forms Automation
  - Communications/Training
  - Policy
  - Systems
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Identified Issues and Recommendations
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Current State Identified Issues

- State/Regulatory
  - State involvement slows things down
  - Vendors must register with State prior to submitting bids
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Future State Recommendations

- State/Regulatory
  - Long Term
    - Increase threshold for “Small Purchase P&A” from $20k to match $80k threshold of “Small Purchase”
    - Remove or delay registration requirement for Secretary of State/Board of Elections
  - Short Term
    - Remove Chief Procurement Officer from the Procurement Bulletin Workflow for Sole Source
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Current State Identified Issues

- Forms Automation
  - Questions are not clear or require multiple forms
  - No way to track changes made to the data
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Future State Recommendations

- Forms Automation
  - Short term
    - Create/Update paper forms to electronic version
    - Combine the Financial Disclosures/Conflict of Interest form with the Certifications for Vendors
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Current State Identified Issues

- Training/Communications
  - Many University Departments are unfamiliar with these purchase methods
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Future State Recommendations

- Training/Communication
  - Short Term and Long Term
    - Retrain University Departments on these purchasing methods
  - Short Term
    - Communicate benefits of strategic awards and available consortia to University Departments
  - Long Term
    - Improve OBFS website
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Current State Identified Issues

- Policy
  - Little use of cooperative/master agreements, IPHEC buying power
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Future State Recommendations

- Policy
  - Short Term
    - Pull spend analysis of goods and services and determine if a Master Contract is needed
    - Mandating use of Master Contracts
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Current State Identified Issues

- Systems
  - Manual processes to conform to the State regulations for bulletin postings
  - Lack of communication between systems
  - Lack of automation within the systems we use
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Future State Recommendations

- **Systems**
  - **Short Term**
    - Workflow and status – Ability to see where requisition resides in entire process
    - Ability to return Requisition in Banner to the originator
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Future State

What have we missed?
Next Steps

- Present feedback to Project’s process Team
- Finalize future state
Contact Information

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Thank YOU!