Source2Pay Project

Process – Purchase Methods Requiring Solicitation

Current State

Focus Group Meeting
January 24 – 26, 2017
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
Process – Purchase Methods Requiring Solicitation

Purpose of the process

The process ‘Purchase Methods Requiring Solicitation’ exist to:

• provide a consistent process that advertises procurement opportunities in order to promote open and fair competition to obtain the best value for the University System.
Process – Purchase Methods
Requiring Solicitation

Process Boundaries

**Begins:** Starts when either a Requisition which requires a solicitation is received by Purchasing and the budgets exceeds the small purchase threshold of $80,000 Competitive Sealed Bids and RFPs and over $20,000 for P & A, or Strategic Procurement identifies the need for a solicitation.

**Ends:** The state authority to purchase the item is granted(award published, PPB waived).
Process – Purchase Methods Requiring Solicitation

1. Identify Need
2. Develop Specifications/Requirements
3. Publish
4. Evaluation
5. Award
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What do you do to Purchase Goods/Services that require a Solicitation?
Current State

Issues with the current process?
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!