Source2Pay Project

Process – Purchase Methods Requiring Solicitation
Future State
Focus Group Meeting
February 28 – March 2, 2017
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

- Identify Need
- Develop Specifications/Requirements
- Publish
- Evaluation
- Award

OFFICE OF BUSINESS AND FINANCIAL SERVICES – Business Solutions & Support

3/6/2017
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Current State Identified Issues

- RFP process takes too long
- University spends more money due to solicitation process
- State involvement lengthens and complicates process
- Lack of info on OBFS website regarding solicitation process and templates
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Current State Identified Issues

- Inconsistent process and terminology between campuses
- Inconsistent process and terminology between SPO’s
- Inability to track the progress of the request through its many steps
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Future State Recommendations

#1: Evaluate the approval steps involved when posting to the Bulletin

#2: Create electronic submissions for all bids and RFPs
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Future State Recommendations

#3: Standardize terminology, procedures, and forms between Purchasing and all University System Departments

#4: Create one comprehensive University Systems Purchasing website for solicitations
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Future State Recommendations

#5: Make training mandatory for Unit Purchasing employees on solicitation requirements

#6: Lobby the State to re-allow the exemption process eliminated recently
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Future State Recommendations

#7: Develop standards for the Office of Procurement Diversity’s involvement in the procurement processes.

#8: Provide method to display Purchase Orders with contracts/Bid/RFP #s and amount spent/remaining
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Future State Recommendations

#9: Lobby the State to relax or remove requirements for State oversight

#10: Request standardization amongst State Procurement Officers
Next Steps

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

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Thank YOU!