

Procurement Quarterly

MARCH IS PURCHASING MONTH

Across the country purchasing professionals in business, institutions, and state and municipal governments who strive daily to reduce costs, encourage competition, and promote high ethical standards celebrate March as Professional Purchasing Month.

We encourage campus departments to thank those individuals entrusted with procurement responsibilities, both within Procurement Services and within the organizational unit itself.



UNIVERSITY TERM CONTRACTS

The term contract renewal season is approaching. Notices regarding your contract renewal or rebid options will be sent shortly, however, if a master contract exists or we can consolidate multiple bids Procurement Services will make the determination about the path to proceed. Please begin assessing the needs of the contract to determine if contracts will continue or if quantities should be revised due to an increase or decrease in demand. In addition, if a rebid is required the specifications should be revised and attached to the requisition prior to submitting to Procurement Services. **Requisitions must be submitted no later than Friday, April 13th.**

ANNOUNCEMENTS

- ⇒ **Workday 30 Release** The Workday platform will be updated March 10, 2018. Some notable new functionality to the Procurement module are:
 - Ability to mass change requesters on requisitions
 - Ability to create receipts using a mobile device
 - Ability to close PO lines for receiving
 - Ability to identify supplier part numbers on non-catalog item Requisitions/POs

More information on these changes is forthcoming.

- ⇒ **New Dell Account Representatives** Our new Dell account rep is *John Barcelona* and new inside sales rep is *Shannon McKinney*. Their contact information can be found on the [Dell Master Contract webpage](#).
- ⇒ **Purchasing Agents** are reminded to submit their Purchasing Agent Certification (PAC) transcript to document training attendance. Instructions on how to access the assessment test will be sent via email. Once successfully completed, individual must generate the certificate of completion which serves as a prompt to send the Delegation of Authority Memorandum of Understanding (MOU). A copy of the fully executed MOU will be returned to the Purchasing Agent to complete the certification process.
- ⇒ **Procurement Services Welcomes Chelsea Santangelo!** Chelsea has a BS in Family and Consumer Science, graduated in 2007 from SLU and has worked a variety of jobs since then. She's married with 6 fur babies and likes to do yoga and spend time with family in her off time. Her hobbies are shopping, traveling, and meeting new people.

Chelsea will take over the MRO desk formerly occupied by Charlotte Newman who has OFFICIALLY retired from LSU. See the staff directory for a list of Chelsea's commodities.



Finance & Administration
Procurement & Property Management

Upcoming Training

Specifications 101

Tuesday, March 20, 2018
1:00 PM – 2:00 PM

Complex Specifications

Tuesday, March 20, 2018
2:30 PM – 3:30 PM

Methods of Procurement

Tuesday, April 3, 2018
9:00 AM – 10:00 AM

Professional, Specialty & Consulting Services

Tuesday, April 3, 2018
10:30 AM – 11:30 AM

All classes to be held in Peabody Hall Room 225.

To view classes and register:

- ⇒ Log in to myLSU
- ⇒ Click on 'Employee Resources'
- ⇒ Click on 'LSU Training and Event Registration'
- ⇒ Locate the appropriate training then click on 'View Classes'
- ⇒ Click 'Register'
- ⇒ Email confirmation sent to registrant

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Supplier Diversity Corner

The University is dedicated to promoting the growth and development of minority, women, and small and historically underutilized businesses (“Diverse Businesses”) by providing opportunities to participate in University contracts and bids. The Supplier Diversity office, which reports through Procurement Services, is currently developing the university’s goals or targets for Diverse Supplier participation.

Barbara Robillard joins our team as the **Supplier Diversity Manager**.

Barbara has a Bachelor of Science in Education from Southern University and has over 25 years of professional experience in the education industry. Barbara is a passionate and driven person, committed to the educational environment, community and team management. She is supportive and an expert in diversity, leadership and working with integrity; developing transformation which leads to collective greatness. Barbara brings a wealth of experience in public/ private management, leadership, project management, process management, dependability and professionalism. Barbara knows first-hand the impact positive learning environments have on current and future leaders! She understands the importance of effective communication, working collaboratively with individuals and teams. She is committed to providing unwavering dedication to the success of the LSU Strategic Plan and the Supplier Diversity project!

Complex Procurement Projects

In an effort to achieve operational efficiencies within the LSU System, Procurement Services has implemented a project management system to assist in determining the optimum procurement approach for complex procurements. This system will be used to prioritize projects based on key aspects of the procurement. Before requesting a complex procurement project, please exhaust all options through our current strategic partnerships (master contract suppliers).

Procurement Services has entered into strategic partnerships with our master contract suppliers to leverage the University’s buying power and to streamline the procurement process for products and services offered through their portfolio of manufacturers.

Examples of Complex Procurements are based on the following types of procurements:

- * Request for Proposals (RFP)
- * Request for Quotes and Qualifications (RFQQ)
- * IT Projects*
- * Equipment Purchases exceeding \$100,000
- * Solicitation for Offers (SFO)
- * Equipment Lease Purchase
- * Campus/Enterprise-wide Solutions
- * Janitorial & Manpower Service Contracts exceeding \$50,000

Note: This list is not inclusive to all types of Complex Procurements.

**IT Projects are Information Technology procurements that require IT involvement and/or IT Governance approval and therefore must go through the ITS Portfolio Management Office (PMO). Procurement Services and Information Technology Services will coordinate efforts for this type of procurement.*

Effective March 2nd, 2018, departments must complete the Complex Procurement Request and email the completed request, along with all supporting documentation, to Stefanie Kirkwood (skirkwood1@lsu.edu) in Procurement Services. Departments will be advised of when a Workday requisition is needed in the process. Upon submission of the request and required attachments, a determination will be made by Procurement Services as to the method of procurement and estimated schedule of the request.

This procedural change applies to all campuses.

Property Management

2018 Annual Inventory

The 2018 inventory cycle will open in the Inventory Scanning Application on March 1. Departments may begin conducting annual inventory at that time. We will again offer two Kickoff Sessions, which will include a review of the process, key learnings from our first full cycle last year, as well as enhancements for this year. The session on March 7 will also be simulcast online and recorded for those located outside of Baton Rouge.



- ◆ Wednesday, March 7; 2:00 pm – 3:30 pm
- ◆ Wednesday, March 14; 2:00 pm – 3:30 pm

Save the date! Location details and registration instructions from Property Management coming soon!

Please contact Property Management at property@lsu.edu if you need additional assistance with the inventory process.

Apple Purchases



Departments are encouraged to purchase Apple products from LSU's master contract supplier CDW-G via their catalog in Workday. Most off-the-shelf Apple products (iPads, Apple TVs, Apple Care, and Apple-branded accessories) are aggressively priced at OR below Apple institutional prices. CDW-G is still in the process of negotiating with Apple to sell all items at institutional pricing. Procurement has identified these categories of items in which departments may continue to purchase directly from Apple via a non-catalog requisition in Workday:

- Custom Configuration purchases
- Bulk Quantity Packs (5 or 10 pack)

In the event the pricing for Apple products found on the CDW-G catalog are still higher than the institutional pricing and does not meet one of the 2 exceptions, the department must reach out to our dedicated CDW-G sales representative, Matt Felvey at matfelv@cdwg.com. In most cases he can match the institutional price and provide a special quote to be uploaded through the catalog. If CDW-G cannot provide this item, this statement must be obtained in writing and attached to the requisition prior to submitting to Procurement Services.

Promotional Items

The PUR522 form must be completed and approved for all promotional items, trophies, plaques, awards, and uniforms prior to purchase (regardless of the cost and method of payment). Upon approval, normal purchasing procedures are to be followed. Items must relate to the mission of your department, the University or the State. The approved form must be attached to either a requisition or expense report submitted for payment. Promotional items and items requiring use of the LSU name, trademark and/or logo must be procured from a supplier on the LSU licensee list. The list of approved suppliers can be found at the following link, <https://sites01.lsu.edu/wp/lisucom/lisu-licensee-list/>.



Promotional Items - University departments may purchase promotional items of no intrinsic value to be distributed without charge in anticipation of generating additional revenues. The PUR522 is required for ALL promotional items regardless of if the university's name, trademark and/or logo is used.

Trophies, Plaques, and Awards - There is no legal obligation for the University to give a plaque, trophy, or other award to any student, faculty, staff, individual, organization or entity. University funds can be used if the recipient 1) qualifies under a University approved rewards and recognition program or 2) is selected through established selection criteria for the award.

Uniforms - In addition to the approved PUR522, the department must provide an approved written uniform policy prior to purchase. The policy must be approved by the Department Head and Procurement Services.

NOTE: This form is NOT required for standard printed materials used to promote the University internally or externally (e.g. brochures, posters, banners, annual reports, etc.). The contents of reputation-defining publications require the approval of the Division of Strategic Communications.

Workday Tips

Workday Requisitions Shipping Address Error

In most cases, either the company address or the employee's work address listed in their profile has defaulted to the order which is **not** a valid ship to location for supplier website (punch-out) orders. The initiator must select a valid address from the ship to address field in the requisition. The defaulted address must be removed and initiator should search for the building in the keyword search field. All allowable ship to addresses will appear for selection. [Click here](#) to view the shipping address keyword crosswalk.

Liquidating Workday Purchase Orders

The Close PO (liquidation) process is used when the remaining quantity of goods or services of all PO lines **will not** be received or rendered, and receipts or invoices have been created and paid. This is different from a PO Change Order and PO Cancellation.

Please begin assessing your department POs and request liquidation of those with unused balances by sending an email to purchase@lsu.edu requesting PO # be liquidated (closed). Email must include reason for liquidation and written communication (email sufficient) between the supplier and the department confirming the remaining goods will not be shipped/services will not be rendered.*

*Does not apply to Professional, Specialty and Consulting Services Contracts or Construction. Contact Buyer-of-Record directly.

For more Workday tips, visit http://www.lsu.edu/administration/ofa/procurement/Workday_Procurement_FAQs.php.



Sole Source Procurements

Sole source purchases are exceptions to normal purchasing rules, and are made when a single source has been identified for a good or a service. The procedure for [Sole Source Procurements \(PRO-U501.B.01\)](#) outlines the various methods in which a sole source purchase can be made and links to the individual task sheets based on the type of sole source purchase.

The [Sole Source Justification Form](#) must be completed for all sole source purchases and additional information must be provided that confirms the supplier from whom the purchase is being made is both (1) the sole manufacturer and (2) the sole distributor. We have revised the sole source justification form in an effort to streamline the process. The new form will request the required information needed for review by sole source type on the form rather than through email and provide an outline of the required requisition attachments.

Following a formal review by Procurement Services, if sole source documentation is not approved, a competitive solicitation is required.

Note: ALL Sole Source Procurement approvals are on a one-time basis and transactions are reported to and reviewed by the Legislative Auditor annually.

Procurement Reminders

- ⇒ Specifications submitted to Procurement Services must be in a **Word** document and without password restrictions.
- ⇒ Visit the [Policies & Procedures](#) page to stay current on procurement code policies & procedures.
- ⇒ The turnaround time for requisitions released to Procurement Services is typically **7-10 days**. Please plan requisition submission accordingly. Purchases requiring competition will require additional time to allow for the competitive process.
- ⇒ Departments are responsible for training and relaying procurement changes to all staff (including student workers) who initiate purchases. Student Workers **should not** submit ServiceNow tickets regarding Workday issues but rather should contact the department business office for assistance. If problem cannot be resolved internally, the business office should enter the incident in [ServiceNow](#).
- ⇒ A W-9/W-8 hand-signed or digitally approved signature is required for all supplier enrollment applications. Failure to submit the form may cause delay in supplier setup.
- ⇒ All full time employees and student workers automatically have access to Procurement transactions. A Security Access Request form should not be submitted to request Procurement roles for Workday. These roles are specifically for personnel in the Procurement Services/Purchasing offices.
- ⇒ Departments are reminded that "Click Through" software/subscription agreements still include terms and conditions which must be approved by Procurement Services to ensure a thorough review of the terms and conditions is conducted prior to the purchase.
- ⇒ In cases where a department is working with a specific contact within a supplier organization to obtain a quote for services or have received specific contact information in which to send quotes/bids or purchase orders, the collected supplier contact information should be listed in the internal memo field of the requisition to ensure the document is received timely.
- ⇒ All guest speakers must be setup as a supplier in Workday in order to receive payment. Departments should encourage the supplier to complete the [LSU Supplier Registration Form](#) at the time they are invited to present.
- ⇒ The supplier providing bus charter services has changed to STM Driven. The revised contract now also includes school bus charters. For more information refer to the [A-Z Index/Bus Charters](#) webpage.
- ⇒ Purchasers are reminded that special authorization is required for the purchase of certain goods and services regardless of cost and method of payment (PO, LaCarte or Direct Charge). Prior approval(s) as indicated on the [Special Authorizations List](#) must be obtained before the purchase is made and attached to the entry (Requisition, Expense Report or paper form) prior to submission to Procurement Services or Accounts Payable & Travel.
- ⇒ [Library Notes](#) (AKA Solicitation Terms & Conditions) have been compiled in a PDF and posted on our website for department use when specifying terms and conditions on solicitations and purchase orders. Departments are encouraged to review the preapproved language and use according.

Staff Directory

Sally A. McKechnie
Assistant Vice President for Procurement & Property Management
Chief Procurement Officer

225-578-2307
smckechnie@lsu.edu

Michele M. Montero
Associate Director

225-578-2306
mmorr12@lsu.edu

Procurement Administration; Complex Request for Proposals (RFPs), Solicitation for Offers (SFOs) and non-routine ITB's for Procurement of Goods and Operating Services, Supervision of Construction, Contracting, Procurement, Procurement Systems and Supplier Management Staff

Barbara H. Lewis
Assistant Director

225-578-2035
barbaralewis@lsu.edu

Construction and Special Projects

Tiffany N. Robinson
Business Development Manager

225-578-2739
tcart12@lsu.edu

Workday Procurement Administrator; Procurement and Workday Training Supervisor; Procurement Security Access Data Steward; Newsletter; Website Management; MBE/WBE Reporting; Supervision of Front Desk, Student Workers, Supplier Management Staff

Barbara Robillard
Supplier Diversity Manager
Supplier Diversity

225-578-2285
brobillard1@lsu.edu

Alexandra T. Huber
Buyer
Appliances, Automotive equipment and supplies; Boats and Marine supplies; Furniture; Fuel; Charter Services; Vehicles

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

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

225-578-5510
jeneledet@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
Buyer
Advertising Contracts/Agreements; Art Museum Agreements; Caterer Licensing; Software & Subscription Services and Implementation

225-578-2097
jprice1@lsu.edu

Linda F. Hebert
Administrative Coordinator
Supplier Enrollment & Maintenance; Public Bid Openings; Newspaper/LaPAC Bid Posting

225-578-2301
lhebert@lsu.edu

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

Rose B. Bourg
Administrative Coordinator
Procurement Support Services; Business System Purchases; State Contract Purchases under \$50,000

225-578-9440
rbourg@lsu.edu

Chelsea Santangelo
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

225-578-6482
csantangelo1@lsu.edu

Sharday D. Warner
Buyer
Construction/Renovations Projects

225-578-2289
swarner@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

Stefanie Kirkwood
Executive Administrative Assistant
Assistant to the Assistant Vice President for Procurement & Property Management

225-578-2305
skirkwood@lsu.edu

Stephen D. Walczak
Strategic Sourcing Analyst
Strategic Sourcing & Spend Analysis; Supplier Website Error, Delivery & Supplier Issues

225-578-2303
swalczak@lsu.edu

This newsletter is posted on <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 or deletion from this list, email Tiffany N. Robinson at tcart12@lsu.edu.