

2019 PROCUREMENT SUMMIT

# DISCOVERING MAGIC IN THE PROCESS



# DISCOVERING MAGIC IN THE PROCESS

October 9-10, 2019



## Procurement Institute

- (3 Hours Total)
- This comprehensive session, designed for new LSU employees who support the department in procurement, provides an overview of LSU Procurement by identifying fundamental concepts and policies; the procurement process do's and don'ts; the roles of LSU Procurement Services vs department purchasing professionals; and the importance of ethics and integrity in procurement.
- ***This session is required for new purchasing agent certification applicants.***

# Wednesday, October 9, 2019

8:30 a.m. – 9:30 a.m.

## OPENING REMARKS

9:45 a.m. – 11:15 a.m.

### **\*MAKING THE MOST OF WORKDAY FINANCIALS**

*Presented by: Workday FIN SMEs*

Do you manage your department's budget? Or are you the one responsible for purchasing and/or paying the bills? Perhaps you are reconciling ledgers for your department accounts or grants? If you answered yes, join the LSU Workday Financials Subject Matter Experts to learn tips and tricks to streamline your day-to-day processes.

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### **CONTRACT MANAGEMENT 101: PLANNING AND PROCUREMENT**

*Presented by: Sally McKechnie and Jamie Maddie*

Just as a chain is only as strong as its weakest link, a contract can be only as strong and as successful as its administration. In these highly practical courses, we will address all aspects of effective Contract Management — from initial award to final closeout.

You will learn proven practices for getting contracts off to a solid start, keeping them on track and handling every problem that arises.

Contract Management 101 will consist of understanding the first steps in contract management, which include Planning and Procurement.

Planning is crucial to the successful outcome of any procurement. With proper planning, you are more likely to achieve your contracting objectives. Planning assists in determining need, preparing the statement of work, choosing the appropriate procurement type, solicitation, negotiation, and drafting the contract.

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### **\*IT'S TIME TO GET FIERCE FOR THE FUTURE!**

*Presented by: Holly Houk*

The LSU brand is more than our logo and school colors. It's what students, faculty, alumni, peers, and outside onlookers think, feel, and respond to when they encounter anything and everything LSU. This presentation will showcase the recent refresh of the LSU brand, including its core essence, tone and messaging, as well as an overview of new graphic assets and soon-to-be-available tools that will allow you to use the brand easily while maintaining compliance.

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### **RELATIONSHIP BUILDING WITH SUPPLIERS AND YOUR INSTITUTION/DEPARTMENTS**

*Presented by: LSU Procurement, Stakeholders, and Summit Platinum Sponsors*

Attend an enlightening panel discussion regarding building good relationships between the Supplier Community and our Institution/Departments. Learn why this is so important in your day-to-day work. Hear from your peers and suppliers how you can develop the experience and build confidence in your ability to effectively work with your Suppliers.

**\*LSU EMPLOYEES ONLY**

# Wednesday, October 9, 2019

1:15 p.m. – 2:15 p.m.

## LEADING TEAMS THROUGH EMOTIONAL INTELLIGENCE

*Presented by: Dana Hart*

In this session, you will learn how to become more effective in leading teams and building coalitions through Emotional Intelligence (EQ). With enhanced communication and ways of thinking, you can resonate with your followers, establish deep and meaningful relationships, and practice solid values.

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## THE BASICS OF CONTRACT LAW

*Presented by: Trey Jones*

What is a contract? This session will cover the importance of a written contract, what type of contract you will need, contract terms and much more. Take the time to discover the important components of a contract and piece together what the contract really says.

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## \*PROCUREMENT INSTITUTE (DAY 1)

*Presented by: Tiffany Robinson*

This comprehensive session, designed for new LSU employees who support the department in procurement, provides an overview of LSU Procurement by identifying fundamental concepts and policies; the procurement process do's and don'ts; the roles of LSU Procurement Services vs department purchasing professionals; and the importance of ethics and integrity in procurement.

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## \*LSU WEB & TECHNOLOGY ACCESSIBILITY GUIDELINES AND TECHNICAL SPECIFICATIONS

*Presented by: Dr. Matt Lee and Lori Martin*

Recent estimates indicate that 1 in 5, or 20% of Americans have at least one disability. As a flagship public institution, LSU seeks to establish total access to both the University online presence and digital resources and content more broadly for persons of all abilities. Within this presentation, you will learn how to:

- Recognize the importance of federal statute and institutional policy governing digital resource and content accessibility
  - Understand tools available to you to perform your basic duties
  - Identify training opportunities for you to utilize the tools provided
  - And review information related to institutional resources available to ensure accountability.
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## SPECS, SPECS AND MORE SPECS

*Presented by: Michele Montero and Alexandra Huber*

Are you properly skilled in the Art of Specification Writing? Are your specifications open and promote competition? Whether for small or large solicitations, specifications must be carefully prepared. This session will focus on the basic principles, techniques, and tips for preparing specifications for not only goods and services but also for more complex procurements which typically identify other items such as scope of work, evaluation criteria, and technical and financial requirements.

**\*LSU EMPLOYEES ONLY**

# Wednesday, October 9, 2019

2:30 p.m. – 3:30 p.m.

## **SHOW ME THE PAPER: A SNAPSHOT OF LOUISIANA PUBLIC RECORDS LAW**

*Presented by: Johanna Pasado*

What is a public record? Do I have to turn my emails over? Are there any exceptions? This session will give a brief overview of Louisiana's Public Records Law and its application to public institutions and procurement activities. Learn how to avoid certain information you put in writing from ending up on the front page of the local newspaper or running across social media sites. This session will also cover who public record requests should be made to, in what manner and what can someone ask for in a request.

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## **LED RESOURCES – HUDSON AND VETERAN INITIATIVES**

*Presented by: Tatiana Bruce*

Louisiana Economic Development's Small Business Services (SBS) offers a suite of programs that assist small and emerging businesses with achieving sustainability and growth. These programs provide a broad range of services to equip small businesses with the tools they need to build capacity, increase opportunity and accelerate growth.

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## **\*PROCUREMENT INSTITUTE (DAY 1 continued)**

*Presented by: Tiffany Robinson*

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## **CONJURING AND VANQUISHING YOUR RISK: RETENTION, AVOIDANCE, AND TRANSFER**

*Presented by: Colorado Robertson and Ashley McGowan*

Organizations are constantly facing risks that threaten the organization's people, property, reputation, and financial operations. One area where such risks can be managed, as if by magic, is within the procurement process. The risks are sometimes readily identifiable, but oftentimes they are hidden within the contracts and agreements. This session will discuss effective risk identification and analysis techniques on how to vanquish your risk (retain, avoid, or transfer) within the procurement process

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## **SOLE SOURCE PROCUREMENTS**

*Presented by: Amy Bourgeois*

What is a sole source procurement? Is my purchase exempt from standard purchasing bid procedures? The sole source procurements session will focus on the requirements, which include the information from campus departments and the information from suppliers. The session will also focus on the difference between sole source procurements and solicitations that include approved proprietary specifications.

**\*LSU EMPLOYEES ONLY**

# Thursday, October 10, 2019

9:00 a.m. – 10:00 a.m.

## **KEYNOTE SPEAKER: “DISCOVERING MAGIC IN THE PROCESS”**

*Presented by: Mark Robinson*

10:15 a.m. – 11:15 a.m.

## **CONTRACT MANAGEMENT 102: EFFECTIVE MONITORING AND OVERSIGHT**

*Presented by: Sally McKechnie and Jamie Maddie*

Contract Management 102 consist of understanding the elements of a contract and effective monitoring and oversight.

This extended course provides a framework for examining contract administration by focusing on essential elements of the discipline. The intent is for you to develop a strong understanding of the complexities of contract administration and recognize the importance of planning, monitoring, and proactive insight into and oversight of contract performance. Practical examples, discussion, group exercises will be used throughout the class.

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## **ETHICS AND AN EVOLVING LANDSCAPE**

*Presented by: Aaron Carter*

This session will cover how there is always an evolving landscape in public sector. Join us as we examine the evolving landscape around risk, compliance and ethics.

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## **\*PROCUREMENT INSTITUTE (DAY 2)**

*Presented by: Tiffany Robinson*

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## **\*WORTH THE WAIT: ASSET DEPLOYMENT IN A UNIVERSITY SETTING**

*Presented by: Toliver Bozeman and Jason Whitfield*

You’ve gone through the process of placing an order and you finally receive the asset. It feels like Christmas, and the first thing you want to do is send it off and get your money’s worth out of it. But there are a few steps that need to be completed before this is truly ready to be sent to the dark corners of the university. To make sure these assets are tracked and protected from the dangers of the unknown, we must first make sure it is received properly, a tag is affixed to it, and that the department coordinates a place for it to reside. This session covers what to do between delivery and deployment.

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## **THE BID GAME**

*Presented by: Stephen Walczak and Nicole Covarrubias*

The bid game is a workshop that lets participants experience the inner workings of the bid process from origination at the end user through an awarded bid, which is issued to the supplier. Through this simulation, participants will be able to experience the multifaceted challenges during the bid process that affect the overall processing time, soft & hard costs, and decision making.

**\*LSU EMPLOYEES ONLY**

# Thursday, October 10, 2019

12:45 p.m. – 1:45 p.m.

## **LEGISLATIVE UPDATES AND STATEWIDE CONTRACTS: WHERE (SOME OF) THE MAGIC HAPPENS**

*Presented by: Jonathan Walker*

We will look back at the 2019 Legislative Session, to review new legal requirements regarding procurement, as well as get a sense for the public procurement environment through the lens of proposed bills that did not pass. We will also examine statewide contracts established by the Office of State Procurement, and answer the who/what/when/where/why/how questions of statewide contracting, as well as how to access statewide contracts via eCat, OSP's electronic contract catalog. The class will give participants a greater understanding of OSP's approach to contracting, and how such contracts may be useful at LSU and elsewhere.

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## **MANAGING CONTRACTS FROM A DEPARTMENTAL PERSPECTIVE**

*Presented by: Matthew Laborde*

Do you know your key players and their roles? What key performance indicators do you have to mitigate risk of failure? Are you sure that your suppliers are providing what you paid for? This session will walk through the 4 steps of Contract Management.

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## **\*BEST PRACTICES IN ACCOUNTS PAYABLES & TRAVEL**

*Presented by: Patrice Gremillion*

The Accounts Payable & Travel division in the Office of Accounting Services is responsible for all disbursement requests, except for payroll. This session will provide an overview of best practices in processing financial transactions within the procure-to-pay cycle.

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## **STRATEGIC SOURCING**

*Presented by: Stephen Walczak*

Strategic sourcing is a procurement method which uses statistical data from previous purchasing patterns and leverages the product categories and spend information into a single, or multiple, contract(s) which give the best overall value to the University. This session will focus on applying strategic sourcing principals, how to leverage the analytical data gathered, how to engage commodity stakeholders for strategic sourcing activities, and how to manage your strategic suppliers so that both parties value the strategic partnership.

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## **\*ACTIVE THREATS: PROTECTIVE MEASURES & RESPONSE**

This course is designed to strengthen the response capabilities in preparation for a potential active threat incident. An active threat incident will challenge both law enforcement first responders, as well as non-law enforcement campus personnel. It is critical for these parties to work together to prevent or mitigate the effects of an active threat.

**\*LSU EMPLOYEES ONLY**

# Thursday, October 10, 2019

2:00 p.m. – 3:00 p.m.

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## **DEMYSTIFYING INTELLECTUAL PROPERTY IN CONTRACTS WITH STATE AGENCIES (INCLUDING LSU)**

*Presented by: Andrew Maas*

This session will provide a short summary of some of the main types of intellectual property, including patents, copyrights, trademarks, and trade secrets. We will also discuss some of the general theories behind intellectual property, the role it can play in contracts, and how to ensure that the intellectual property clauses are not the reason for the breakdown in the contracting process.

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## **DIVERSITY DEFINED**

*Presented by: Don Lawhorn*

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## **DATA SECURITY AND PRIVACY**

*Presented by: Sumit Jain*

This session will highlight the importance of data for an organization and how data security and privacy considerations must be accounted for understanding what sensitive data is and identifying risks.

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## **\*DEPARTMENT SOLICITATIONS**

*Presented by: Jene Ledet*

Department solicitations (DSOLs) are solicitations conducted by individuals who have been granted solicitation authority. Designated individuals have the option to create department solicitations for procurements up to \$25,000. This session will outline the process departments must follow when creating a department solicitation. This session is mandatory for individuals requesting level 2 purchasing agent certification authority.

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## **COMPLEX SPECS FOR A SIMPLE PURCHASE**

*Presented by: Michele Montero and Alexandra Huber*

Specifications are critically important to any procurement. Poorly written specifications can lead to lack of competition, purchasing an inappropriate commodity, protests, contract disputes and cost overruns. This hands on course will help apply skills based on the foundation established in “Specs, Specs and More Specs”.

**\*LSU EMPLOYEES ONLY**



**DISCOVERING MAGIC IN THE PROCESS**

Wednesday, 10-9-19	Exhibit Hall/Lobby	Room #1	Room #2	Room #3	Room #4	Room #5 - Next Door	
7:30a-8:00a	<b>Registration Opens (with Full Breakfast)</b>						
8:00a-8:30a							
8:30a-9:00a		<b>Opening Remarks</b>					
9:00a-9:10a							
9:10a-9:15a							
9:15a-9:30a							
9:30a-9:45a		<b>Meeting room transitions</b>					
9:45a-10:00a	<b>SUPPLIER SETUP</b>	<b>*Making the Most of Workday Financials</b>  <i>Workday FIN SMEs</i>	<b>Contract Management 101 Planning &amp; Procurement</b>  <i>Sally McKechnie Jamie Maddie</i>	<b>*It's Time to Get Fierce for the Future!</b>  <i>Holly Houk</i>		<b>Supplier Panel: Relationship Building with Suppliers and Institution</b>	
10:00a-10:15a							
10:15a-10:30a							
10:30a-10:45a							
10:45a-11:00a							
11:00a-11:15a		<b>Meeting room transitions</b>					
11:15a-11:30a	<b>SUPPLIER EXPO</b>						
11:30a-11:45a							
11:45a-12:00p		<b>Lunch</b>	<b>Lunch</b>	<b>Lunch</b>	<b>Lunch</b>	<b>Lunch</b>	
12:00p-12:15p							
12:15p-12:30p							
12:30p-12:45p							
12:45p-1:00p							
1:00p-1:15p			<b>Meeting room transitions</b>				
1:15p-1:30p		<b>Leading Teams Through Emotional Intelligence</b>  <i>Dana Hart</i>	<b>The Basics of Contract Law</b>  <i>Trey Jones</i>	<b>*Procurement Institute</b>  <i>Tiffany Robinson</i>	<b>*LSU Web and Technology Accessibility Guidelines</b>  <i>Matthew Lee Toni Sparks</i>	<b>Specs, Specs and More Specs</b>  <i>Michele Montero Alexandra Huber</i>	
1:30p-1:45p							
1:45p-2:00p							
2:00p-2:15p							
2:15p-2:30p							<b>Meeting room transitions</b>
2:30p-2:45p	<b>Public Records</b>  <i>Johanna Pasado</i>	<b>Hudson &amp; Veteran Initiatives</b>  <i>Tatiana Bruce</i>	<b>*Procurement Institute</b>  <i>Tiffany Robinson</i>	<b>Conjuring and Vaquishing Your Risk</b>  <i>Ashley McGowan Colorado Robertson</i>	<b>Workshop: Sole Source Procurements</b>  <i>Amy Bourgeois</i>		
2:45p-3:00p							
3:00p-3:15p							
3:15p-3:30p							
3:30p-3:45p							
3:45p-4:00p		<b>Meeting room transitions</b>					

\*LSU EMPLOYEES ONLY

Thursday 10-10-19	Exhibit Hall/Lobby	Room #1	Room #2	Room #3	Room #4	Room #5 - Next Door
8:00a-8:30a	<b>Registration Open</b> <i>(With Full Breakfast)</i>					
8:30a-9:00a						
9:00a-9:10a	<b>Keynote</b> <i>Mark Robinson</i>					
9:10a-9:15a						
9:15a-9:30a						
9:30a-9:45a						
9:45a-10:00a						
10:00a-10:15a		Meeting room transitions				
10:15a-10:30a		<b>Contract Management 102</b> <b>Monitoring and Oversight</b> <i>Sally McKechnie</i> <i>Jamie Maddie</i>	<b>Ethics and an</b> <b>Evolving Landscape</b> <i>Aaron Carter</i>	<b>*Procurement Institute</b>  <i>Tiffany Robinson</i>	<b>*Worth the Wait: Asset</b> <b>Deployment in a University Setting</b> <i>Toliver Bozeman</i> <i>Jason Whitfield</i>	<b>Workshop: The Bid Game</b>  <i>Stephen Walczak</i> <i>Nicole Covarrubias</i>
10:30a-10:45a		Meeting room transitions				
10:45a-11:00a						
11:00a-11:15a						
11:15a-11:30a						
11:30a-11:45a						
11:45a-12:00p		Lunch	Lunch	Lunch	Lunch	Lunch
12:00p-12:15p						
12:15p-12:30p						
12:30p-12:45p		Meeting room transitions				
12:45p-1:00p		<b>Legislative Updates</b> <b>Statewide Contracts</b> <i>Jonathan Walker</i>	<b>Managing Contracts</b> <b>from a Departmental Perspective</b> <i>Matthew Laborde</i>	<b>*Best Practices in</b> <b>AP &amp; Travel</b> <i>Patrice Gremillion</i>	<b>Strategic Sourcing</b>  <i>Stephen Walczak</i>	<b>*Active Shooter</b>
1:00p-1:15p						
1:15p-1:30p						
1:30p-1:45p						
1:45p-2:00p						
2:00p-2:15p		Meeting room transitions				
2:15p-2:30p		<b>Demystifying</b> <b>Intellectual Property</b> <i>Andy Maas</i>	<b>Diversity Defined</b>  <i>Don Lawhorn</i>	<b>Data Security &amp;</b> <b>Privacy</b> <i>Sumit Jain</i>	<b>*Department Solicitations</b>  <i>Jene Ledet</i>	<b>Workshop: Complex Specs for a</b> <b>Simple Purchase</b> <i>Michele Montero</i> <i>Alexandra Huber</i>
2:30p-2:45p						
2:45p-3:00p						
3:00p-3:15p						
3:15p-3:30p						
3:30p-3:45p						
3:45p-4:00p						

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**LSU PROCUREMENT SERVICES**

213 THOMAS BOYD HALL  
BATON ROUGE, LA 70803  
PHONE: (225) 578.2176

[PROCUREMENT.LSU.EDU](http://PROCUREMENT.LSU.EDU)