

Educational Procurement JOURNAL

NATIONAL ASSOCIATION OF EDUCATIONAL PROCUREMENT

COVER STORY

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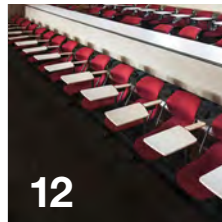
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Watch www.naepnet.org for more information on exciting programs that are coming this year!

IN-PERSON EVENTS

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Doreen Murner
CEO, NAEP

A Path to Success

Technology. Some days we love it, and other days we look for different solutions. One thing for sure, we rely on it all the time now that it has become an indispensable part of our lives. At NAEP, we embrace technology as it helps us work smarter, more efficiently, and allows us to offer access, solutions, and services that we would otherwise not be able to do.

If you attended the NAEP Annual Meeting a few months ago in Louisville, Kentucky, you hopefully downloaded and used our new and improved mobile app. A useful app provides content you want, lets you find it quickly, and customizes your schedule. We're pleased to offer this app again at our 2015 Annual Meeting in Atlanta, Georgia, and we plan to build on that success with a few new features.

You also may have noticed that we are increasing the number of webinars offered. In an ever-digital world, technology has made it easier to provide information and connect us together without ever leaving the comfort of your office space. There will always be a place for in-person meetings throughout the year, but to enhance our educational catalog, NAEP plans to continue the use of technology in the form of webinars and digital roundtables to connect you to subject-matter experts.

I would like to share some big technology news with you! On October 14, NAEP plans to launch a new website that offers a robust user-experience. NAEP is switching to a new cloud-based ERP

software to manage our website and backend database functionality. This change will result in a new website that is more intuitive, offers a robust search capability, and is easier on the eyes! The streamlined registration functionality of our new site will make signing up for the Annual Meeting, in-person institutes, and webinars significantly easier. If you are looking for a particular RFP in our RFP library, you will now have an easy-to-use search feature to quickly find what you are looking for. Ahead of this launch, we will be providing training so that you can hit the ground running when we launch.

And in more big technology news, NAEP plans to launch our searchable contract library, NAEProcure, as part of this new technology launch.

NAEProcure is a robust, searchable database of vendor and GPO contracts. You will have the ability to search and compare contracts in this portal. The search feature will allow you to filter results in a wide variety of options, such as, if a contract was competitively bid (and if so, where) and if a vendor is a minority- or woman-owned business.

NAEP is constantly striving to improve our Member experience and bring you the tools you need to thrive. There has never been a better time to be a part of this great group. NAEP is moving forward at the speed of light. There's an app for that, right?

Tips for a Successful E-Procurement Launch

by **Cory Harms, M.S.**
Iowa State University

Although e-procurement has been around for a while, many institutions are just starting to implement a system or are considering migrating to a new provider. Whatever the case, the rollout of an e-procurement initiative can affect its long-term success. Having been through two different launches, I would like to offer some tips that could help a launch be more successful.

Early User Involvement

When planning your launch, look at the vendors that you will enable first and select users who are their high volume customers. You may also want to choose a couple of users who may not be “high-end” but who have shown themselves to be system-savvy. Involve this group in the design process and get feedback on expectations or preferences for the new system. Demo the system to the group members and get their opinions on what works well and what may be confusing or difficult to navigate. These individuals can be your advocates to help you recruit other users or to provide favorable testimonials.

Make It Easy and Make It Better

Any system you implement should be better than what you were doing previously. Stay away from complexity or creating more work. Your e-procurement platform should make buying easier and provide better tools, functionality, and visibility than what you were doing before. You need to promote these advantages as you roll out to new campus-users. Promote things like the ease of use, higher spend limits, increased visibility, better documentation, faster order and delivery, single login and password or any other new advantages.

Start with a Pilot Group

If possible, pilot the solution with the user group that helped in your design phase. This group can help work out any kinks or bugs.

This may also help you identify navigational difficulties, confusing terms, or any other issue that may make learning or adaptation difficult. Use this feedback to help develop your training for future groups. Then add new groups in phases.

Enable High-Value Experienced Vendors First

Talk to other people who are using your solution and find out which vendors were easy to implement. Not all large vendors can enable quickly and easily. Find the companies that are routinely quick, successful, and have robust sites. Enable these high-volume, high-success vendors to give your users a great first experience and allow you to get some catalogs up and running early. As your users get familiar with these early vendors you can start adding other vendors as they become ready—and enhance the user experience.

Kick-off with a Show

After your initial pilot groups have created buzz, put on an e-procurement show and invite your campus to meet the early vendors and the purchasing department, to see the new platform. Your vendors can talk to users and promote the functionality of their respective sites. Have a nearby room available and equipped for individual vendor presentations (every 20-30 minutes or so). This allows a large group to see those vendor sites on your e-procurement platform and ask questions. Provide food and beverages, and your attendance will be even higher. Have a table where people can sign up to be in the next rollout phase. If being on board early is seen as a privilege, it may enhance the buy-in.

Follow with Vendor Rollout Meetings

After your initial kick-off meeting, hold two or three campus meetings for each of your initial

vendors, and then again as you roll out a new vendor. Schedule the meetings in buildings in which the teaching or research matches the offerings of the would-be vendor (e.g., science buildings for lab vendors). Use rooms that have the media needed to demonstrate the vendor site so that the functionality can be clearly observed and experienced.

Monitor and Encourage Users

Monitor usage from day one and look for spikes or dips. Monitor your PO and p-card systems to make sure people are not continuing to use unwanted or superseded avenues. Consider closing out contract purchase orders with your e-procurement vendors and make sure they know you want orders to come through the e-procurement portal (if that is your goal). Contact users who have been trained but who are not using the system to find out if they are experiencing difficulty. Often issues can be easily addressed so that usage can be increased.

These ideas are given as a starting point. You will no doubt find many more on your own. Ask your colleagues; ask for vendor references; attend user conferences. Avoid the mistakes that many have made and learn from lessons that others have had to learn the hard way. That is the beauty of higher education and organizations like NAEP. We are all here to help each other succeed.



Cory Harms, M.S., is Associate Director of Purchasing at Iowa State University. He took office as NAEP President in May 2014. He is a Past President of the MINK (Missouri, Iowa, Nebraska and Kansas) Region and serves on the NAEP Editorial Board. He has presented at both regional and national NAEP meetings and has spoken for the Missouri Association of Public Purchasing (MAPP). Email: clharms@iastate.edu.

NAEP Congratulates Sixteen National Award Winners

The NAEP 2014 Annual Meeting, held May 18-21 in Louisville, Kentucky, was a rousing success. From the educational sessions, the keynote speakers, packed exhibit hall and numerous networking opportunities, including the Grand Derby party at the Churchill Downs Kentucky Derby Museum, the meeting provided opportunities to learn best practices and engage with your colleagues from across the country.

The NAEP National Awards were presented during the Association's 93rd Annual Meeting on Monday, May 19, at an emotional awards dinner for recipients and announced at the General

Session the following Tuesday morning. NAEP is pleased to announce the 2014 NAEP National Award winners, in recognition of work done in the year 2013:

NAEP is proud of our
national award winners
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Patricia Moore, University of Alabama-Huntsville (retired), received the Bert C. Ahrens



Patricia Moore

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Achievement Award, NAEP's highest honor, for outstanding contributions to the procurement profession over an extended period of time. Ms. Moore retired as Associate Vice President of Business Services at the university in 2010, after a 40-year career in procurement and higher education administration.

The Distinguished Service Award for extraordinary service to NAEP and the purchasing profession went to three Members: **Carol Barnhill**, Director of Procurement and Travel Services, Arkansas State University-Jonesboro; **Michael McNamara**, Director of Procurement Services, Northeastern University; and **Richard Worden**, Associate VP of Administrative Services, New York Chiropractic College.

"Let's commit to making NAEP better through leadership and volunteerism."

The Bob Ashby Mentor of the Year Award went to **Gary Kraft**, Director of Procurement Services, University of Nebraska, Lincoln.

The Neil D. Markee Communicator of the Year Award went to **David J. Wright**, Director of Communications, University of Washington.

The Young Professional in Procurement Award, recognizing young professionals who have made contributions to the education procurement industry, was presented to two Members: **Shelby Slaughaupt**, Senior Buyer, University of the Pacific, and **Stacy Sassman**, Purchasing Agent, Iowa State University.

The Volunteer of the Year Award went to two Members: **Denise Finn**, Associate Director, Purchasing Division, University of Kentucky, and **W. Thomas Kaloupek**, Director of Materials Management, Virginia Tech.

The Professional Perspective Award, for best article in NAEP's Educational Procurement Journal, went to **Kimberly Dulaney**, Assistant Director and Contracts Manager, Virginia Tech.

The Nancy Tregoe Scholarship, in memory of a former NAEP president, went to **Cynthia Urick**, Procurement Manager, Alvernia University.

The Sons & Daughters Scholarship was awarded to two winners: **Rachel Dean**, University of Alabama, and **Gabriela B. Wilson**, University of Michigan.

An honor reserved for institutions, the Award of Excellence in Procurement, was given to two Member institutions: **Houston Community College** System and **Iowa State University**.

NAEP is proud of our national award winners and all of our volunteers. You—our volunteers—are what makes this organization a success, and we could not fulfill our mission without your support. From our Host

Committee and Program Committee, who were instrumental in the success of this meeting, to our various committees that meet regularly through the year to shape our future—thank you! Now is a great time to volunteer. As our 2014/2015 President Cory Harms, from Iowa State University, said in his incoming president's speech: "Let's commit to making NAEP better through leadership and volunteerism."



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TECHNOLOGY TRENDS

AND THEIR EFFECT ON THE CLASSROOM

THIS ARTICLE WAS DEVELOPED BY

Karin Coopersmith, C.P.M., *Indiana University*

THE CLASSROOM OF YESTERYEAR no longer meets the changing needs of today's students. Technology has changed all our lives and has had a huge impact on the way we structure our personal, educational and professional activities. Let's take a look at some of the innovative ways technology is impacting today's classroom.

How The Technological Revolution is Changing the Future of Education in Unexpected Ways

THE APPLICATION OF TECHNOLOGY in the learning process is ever changing and improving. This account shares the results of a study of 16 schools and how technology is transforming the classroom.

It's no debate that technology has revolutionized education. From the rapid proliferation of online learning to the widespread use of tablet devices in the classroom, "blended learning" (part online, part brick-and-mortar) has become more of the rule and less of the exception in today's education system. As educators begin to rethink learning through the lens of the benefits of using technology, rethinking the design of educational spaces is a pivotal factor in student success now more than ever. To better understand the dynamics and spatial implications of technology-empowered learning, Steelcase Education has released research that shows integrating technology provides both challenges and opportunities for educators and students.

Steelcase Education, the leader in developing active learning spaces, studied 16 schools, including six colleges and 10 high schools (public, private, and charter) across the nation. After conducting interviews with educators, administrators, and students at the primary, secondary, and higher education levels, researchers found that educators can use technology to implement an innovative educational model without compromising the critical role that teachers and bricks-and-mortar schools and campuses play.

The research highlights that technological advances have redefined learning, but the physical space still enhances educational outcomes. Steelcase has identified six insights to help educators consider spatial responses to the technology revolution:

- **Technology is supporting richer face-to-face interactions and higher-level cognitive learning.** Instructors are using technology to replace old models of standardized rote learning and creating personalized, self-directed experiences.
- **Spaces must be designed to capture and stream information.** Multi-user collaboration and virtual classrooms are now possible through the use of multi-device synchronization software.
- **Person-to-person connections remain essential for successful learning.** While online courses are growing in popularity, person-to-person interactions are still important in driving success rates, and many higher education outlets are blending on- and off-line learning experiences.
- **Integrating technology into classrooms mandates flexibility and activity-based spaced planning.** Technology is

helping instructors to advance problem-solving communication and collaboration skills with their students, a key skill set development endorsed by employers.

- **Spatial boundaries are loosening.** Good individual or team workspace is a much higher premium than direct sightlines to the front of the room. Configurable space will serve the future blended classroom better than traditional desks or tables.
- **High-tech and low-tech will coexist.** Analog and digital tools are being combined to capture, visualize, and share ideas. Cognitive mapping research has shown that the physical process of writing and diagramming helps people learn and recall information.

After speaking with educators and students from K-12 through higher education, a consistent theme was continually stressed: The interpretation of the ideal classroom is changing. More than ever, classrooms and informal learning spaces must be highly flexible spaces that support the new behaviors of learning influenced from the use of new technologies. As rapid development occurs and new technologies impact the ways that knowledge is transferred, it is time to refine both the processes of education and the places where it occurs.



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Higher Education Technology Trends

A RECENT SURVEY OF INFORMATION TECHNOLOGY LEADERS REVEALS three of the biggest technology trends in higher education.

The Center for Digital Education and GovConnection recently conducted a quantitative research survey of 151 information technology leaders in education. The survey was hosted on CDE's Education Exchange, an online subscriber community of senior administrators, decision-makers, and IT leaders. The survey reveals that three of the biggest technology trends in higher education are Bring Your Own Device (BYOD), Mobility, and Security.

Students entering college have grown up using technology to take in and process data in ways that have changed the way they learn. Educators and institutions must adapt their way of teaching with technology to not only draw the best and brightest to their schools but to effectively help students reach their full potential, increasing their graduation rates.

As with all trends, there are challenges along the way. The two biggest challenges to these trends are being able to align solutions to the needs of their students and providing professional development for educators.

Align Solutions to Need

Continuously building out infrastructure will not address needs if the network is not managed properly. Currently, institutions are using encryption, back-up/restore, and mobile device identification as solutions to increased mobility. Multi-Factor Authentication and Mobile Device Management are solutions currently being considered or implemented. This simplifies a BYOD implementation, allowing teachers and students to focus on their curricula rather than the technology used to provide it.

Thought Leadership Opportunity

Faculty support, training, and administrative burden were challenges identified to implementing a BYOD environment. "Cloudification" or managing a network is the future and is a trending topic for institutions. Increased cost savings, performance, scalability, supportability, interoperability, visibility, and security are all benefits to proper management and network functions. Antivirus and endpoint security software, Virtual Private Network (VPN), and Authentication software are solutions that can help meet BYOD and mobility challenges. Awareness and training in these areas are critical for institutional and student success.




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Supporting Active Learning in Traditional Classrooms

TODAY'S CLASSROOMS MUST ACCOMMODATE a variety of active teaching and learning styles. They must be highly flexible and adaptable. This article describes how Lynchburg College solved challenges with its 144-seat Hopwood Hall.

Learning needs and instruction methods have changed dramatically over the past several years and continue to evolve today.

In fact, extensive ethnographic research conducted by American Seating reveals several key findings. Among the most compelling is that the environment (in addition to the subject and an instructor's teaching method) plays a critical role in supporting effective learning. Not surprising, the type of seating product used in a classroom can significantly contribute to creating an effective learning environment.

Research also shows that today's classrooms must accommodate a variety of active teaching and learning styles such as instructor- or student-led lecture, individual tasking, presentation, large-group

discussion, or peer-to-peer collaboration. As result, today's classroom—whether for 10 to 20 students in a small room or 50-plus students in a large lecture hall—must be highly flexible and adaptable.

Recently, Lynchburg College realized that its 144-seat Hopwood Hall did not fully accommodate a collaborative learning environment. American Seating's seat layout specialists proposed a unique solution. They suggested creating a deeper floor tier that could accommodate two rows of seating. The front row consists of fixed tables and caster base chairs, while the back contains a tablet arm chair in a beam mount application. This configuration enables the students in the front row to easily swivel their chairs to their peers in the fixed seating directly

behind them, thus creating working groups of two-to-six students. The college also placed freestanding tables and chairs in the front of the hall to facilitate large group discussions.

Today, Hopwood Hall—without the expense of a major renovation—still accommodates a large class size, but also offers the flexibility for small or large group discussions. Additionally, students appreciate the ability to move and interact with their peers.

Creating the most effective learning environment for today's college and university setting is a challenge. But with innovative thinking, expertise and research, solutions can be found.



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Karin Coopersmith, C.P.M., Purchasing Contract Manager at Indiana University, has served on NAEP's Editorial and Sustainability Committees, as District IV Board Member, VP and President of the Indiana Region. Email: kcoopers@iu.edu.



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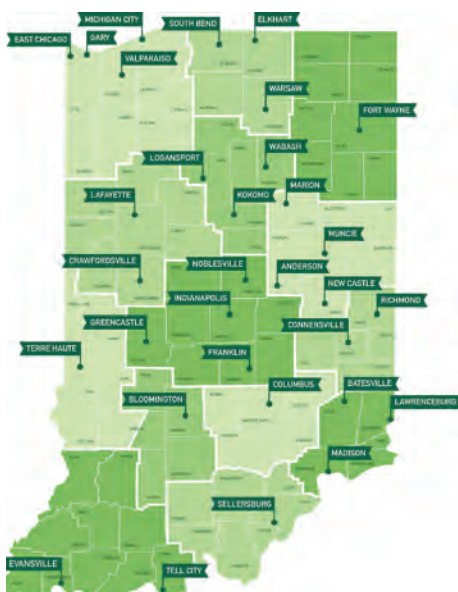
Making the Switch[↕]

Ivy Tech Community College's Newly Implemented Spend Management Suite with ESM Solutions

Many higher education institutions believe that changing their procurement process is time-consuming and more difficult than it is worth. Logically, these organizations resist change unless they are presented with a clear opportunity for significant improvement and savings. Ivy Tech Community College of Indiana is one organization that has realized system-wide procurement improvements with ESM Solutions.

Ivy Tech Community College, Indiana's largest public college system and the nation's largest statewide community college with single accreditation, controls 30 campuses in 14 regions. Ivy Tech was investigating options for their eProcurement program when they discovered what ESM Solutions had to offer. They were surprised to learn there was much room for improvement in the procurement process. Instead of using this information to negotiate new terms with their previous provider, Ivy Tech decided to take a different route. ESM Solutions' breadth of capabilities at affordable prices revealed the advantage of switching. The choice was clear; switching to ESM Solutions was well worth it for Ivy Tech.

"We needed an affordable eProcurement system with tailorable functionalities and configurations to successfully implement a complete procure-to-pay process according to our business rules," explained Mark Husk, Chief Accounting Operations Officer at Ivy Tech Community College, "ESM Solutions provided



us with a cost-effective suite of tools with end-to-end integration with our financial system, Banner® by Ellucian™."

The implementation of ESM Solutions' sourcing, purchasing and contract management solutions involved converting and replicating more than 5,000 workflows, enabling 12,000 non-catalog suppliers and 14 preferred supplier catalogs, and training over 2,100 end-users. The new solution needed to meet Ivy Tech's specific business rules and fully integrate with their ERP Banner system. ESM Solutions worked closely with Ivy Tech's procurement administrators to ensure that the customized solution would be implemented on time, within budget, and to their expected standards. Under their deployment methodology, ESM Solutions was able to complete the entire project in just 6 months, with implementation finishing in January 2014.

Today, Ivy Tech has the ESM Solutions' advantage to eProcurement and spend management. Ivy Tech now has access to additional functionality that would not have been possible

“ ESM Solutions has been a real partner for us in this process. Not only did they make the transition nearly seamless and go above and beyond to make the eProcurement project a success, but they also dealt with our concerns about long-term price stability.

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with another eProcurement provider, much less with a manual process. ESM Solutions' Dynamic Matrix Workflow functionality allowed for over 5,000 workflows from Ivy Tech's previous spend management system to be easily and cost-effectively replicated to their new system. With ESM Solutions, Ivy Tech gained the ability to issue electronic purchase orders and to receive notifications regarding the purchase order process. Ivy Tech's ERP Banner system is seamlessly integrated with ESM Solutions' platforms to allow for the storing and managing of all purchase information. While this added functionality might seem complex, the college's 2,100 end-users easily adapted to the intuitive applications through both live and web-based training, self-service videos and customer support assistance. In the end, Ivy Tech was able to reduce their licensing fees by 50% after switching to ESM Solutions' platform.

"ESM Solutions has been a real partner for us in this process," said Jim Hudson, Chief Procurement Officer

at Ivy Tech Community College, "Not only did they make the transition nearly seamless and go above and beyond to make the eProcurement project a success, but they also dealt with our concerns about long-term price stability. In an environment of never-ending budget challenges, that is a huge benefit for us."

ESM Solutions delivers value by collaborating with the customer to meet their specific business needs, make the process efficient and cost reducing, minimize risk, and maximize compliance for the organization. Organizations still using a manual process or paying for an eProcurement

ESM Solutions at NAEP

Make sure to look out for ESM Solutions at the following NAEP regional and district shows this Fall:

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Upstate NY Great Lake // New England // District II
Carolinas // Michigan

system with limited functionality are wasting time and money. These organizations are foregoing the chance to improve their purchasing process, while others seize the opportunity. Ivy Tech Community College is one entity that has experienced the value of a tailorable system delivered by an innovative eProcurement provider.

For more information on ESM Solutions, visit www.esmsolutions.com and make sure to register for our free solution demo webinars.



Revitalize Your P-Card Program Policies and Procedures to Reap Rewards

by Lynn Larson, CPCP
Recharged Education

Are your Purchasing Card (P-Card) policies and procedures (P&P) helping or hurting your program? How do you know? Repeated cardholder questions and compliance issues are two signs that your P&P are due for a reassessment. Subsequent revitalization of the P&P can cure these ailments and provide the necessary structure for program growth. If your organization is new to P Cards, create healthy P&P from the start to prevent a weak link in the program.

Managing a P-Card program for your institution means you tackle multiple demands every day, so P&P might be the last thing on your to-do list. This is why I developed a guide that makes the process easier, providing five building blocks for effective P&P:

1. Accuracy;
2. Completeness;
3. Accessibility;
4. Readability;
5. Clarity.

But before making any revisions, create an audit trail and support version-control by retaining a separate copy of the existing P&P. Document the date range for which it was in use. This might also prove to be a valuable future reference for you or any member of the program management team. Then start making the necessary corrections for the next version.

Accuracy

Begin by ensuring the P&P are accurate. In addition, they should align with other organization P&P, such as a "Purchasing and Payments Policy." For example, it would be confusing if such a policy states that P-Cards are the preferred payment method for any purchase under \$5,000, but the P-Card P&P note a different dollar threshold. Achieving accuracy allows you to turn your attention to the other aspects.

Completeness

Are the P&P missing something today, based

on the frequently asked questions you receive? Consider beginning the contents with a P-Card overview that would serve as a quick summary for a basic understanding of the program. Such an overview, while not a policy or procedure per se, provides background, helping to establish program buy-in throughout the organization. For example, address:

- What P-Cards are;
- Why the organization has a P-Card program;
- How the organization uses P-Cards;
- Who has a P-Card and who can obtain one.

Other topics should follow in a logical order. A P-Card overview naturally segues into a section on "Roles and Responsibilities." Identify a manageable number of primary topics (e.g., 10 to 15) and the related sub-topics for each. For example, a primary topic of "How to Obtain a P-Card" could include the application process, a description of the mandated training, details about card issuance and activation, and how to replace a damaged card.

Accessibility

If you have not already done so, move toward using your organization's Intranet. For online P&P, give careful thought to your navigation so employees can quickly find what they need. Create a P-Card program homepage that serves as the "go-to" starting point. At the top, include the name of the program manager or administrator and full phone number. Also include a "Program News" statement, or something similar, to highlight a current key message, such as an audit outcome or the achievement of a program goal. The body of the home page should be a table of contents with links to each topic-specific page.

Readability and Clarity

Lack of readability and clarity are often undiagnosed problems in relation to P&P, so incorporating procedure-writing best practices is a must. Take a bird's eye view of each page. Readers need ample white space around text and graphics.

Do the P&P reflect a second-person point of view, speaking to your target audience (e.g., cardholders, managers)? This style is generally friendlier and more concise than third-person point of view, and helps the user connect with the material.

Do the current procedures over-explain tasks that users would/should already know, especially non-P-Card tasks? You need to assume that your target audience possesses a certain level of capability, such as basic computer skills, to prevent this. Conversely, do the current procedures lack information? Define all acronyms at the first usage within each topical section and within a glossary.

Review of Revised P&P

Finally, involve others in the revitalization process. A review by an independent party can help you make improvements before you involve the users. The users, as your target audience for the P&P, can help you wrap up the process. Obtain feedback from a select group representing a mix of traits.

Going forward, after completing a substantial revitalization effort, you can focus on content accuracy and keeping up with necessary changes. Your initial time investment will pay off.



Lynn Larson, CPCP, has more than 15 years of Purchasing Card experience. Her related job roles include education manager for the NAPCP and P-Card Program Manager for the Federal Reserve

Bank of Minneapolis. In addition, her previous work experience includes many years in the procurement field. In June 2007, she earned the Certified Purchasing Card Professional (CPCP) credential, which she continues to maintain. Lynn founded Recharged Education LLC in January 2014 to offer Commercial Card training, consulting, and educational resources (www.recharged-education.com). Email: lynn@recharged-education.com.

Equipment Maintenance Management as a **Valuable Alternative to OEM** Service Agreements and Extended Warranties

by **Finesha Colton-Lee, CPSM**, Iowa State University
Ron Moraski, Rensselaer Polytechnic Institute

Service agreements and extended warranties offered by Original Equipment Manufacturers (OEM) can represent a significant portion of the total cost of ownership of equipment on campus, even if there is little to no maintenance or repair needed during the life of the agreement. So when budgets are questioned and universities are looking for a place to cut, these cost elements, at least on the surface, may be a good place to start. However, depart-



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ments that drop service coverage are left hoping that repairs are never needed or that actual costs will be less than those of agreements. Depending on the piece of equipment, this gamble could prove to be expensive, but one that certain suppliers, such as Remi and Specialty Underwriters, are willing to take by offering Equipment Maintenance Management (EMM) solutions at costs significantly lower than those offered by OEMs.

How Equipment Maintenance Management Works

The workings of EMM programs can vary somewhat depending on the chosen provider and the contract negotiations. When a provider is identified, procurement can take multiple approaches to informing the campus about the availability of this new savings opportunity. The easiest way is to let the provider do all of the

work, but this may not be the most effective. A more active approach is for procurement to quickly obtain competitive quotes from the program provider when service contracts come up for renewal. This raises awareness of EMM and instantly gives the provider much more credibility than would be possible through cold calling. If the customer accepts, the program provider will work directly with the customer to identify all of the eligible equipment and the preferred service provider for each. When the relationship is formalized through a purchase order, the provider then presents a sticker, to be placed on the equipment, that includes an assigned identification number and the provider's contact information. Should the equipment need service, the customer simply calls or emails the provider. Service will be dispatched from the customer's preferred service vendor, which

is often the OEM. If the customer's program includes preventative maintenance, the provider will proactively contact the customer to set up the visit.

Understanding the Value Proposition

Providers of EMM programs are experienced in effectively and efficiently managing the repair process. Tapping into this experience allows the customer to maximize maintenance dollars while minimizing administrative time. These providers do not actually service or repair the equipment and have no vested interest in any manufacturer or service vendor. However, they do know the appropriate market costs of preventative maintenance and repair for virtually every kind of equipment.

An effective EMM program can provide significant value in almost any campus setting (office, laboratory, library, and others). As a means of easing budget concerns, these programs are generally far less expensive than OEM service agreements and extended warranties, with an industry savings average of more than 20 percent. Furthermore, by knowing all of the service costs upfront, departments can set a stable yearly maintenance budget. As a plus to procurement, some program providers tie into consortium agreements, such as E&I Cooperative Services (E&I). While making sense financially, these programs also provide some notable customer-service benefits, the most attractive of which is the simplicity of having one program for all equipment service and maintenance needs. No matter what piece of equipment needs service, the customer only has to reach out to the program provider. Departments also have both the freedom to choose their preferred service vendors (most often the OEM) and the flexibility to customize coverage levels. Online maintenance reports are often available as well.

While the benefits of these programs can be substantial, the reality is that they may not be a perfect fit for every situation. New equipment still covered by the manufacturer's warranty would not need to be covered through an EMM program, nor would any equipment whose value is less than the cost of the program's coverage. As an added word of caution, these programs do not cover software. Sometimes the troubleshooting process involves determining if the issue is with the equipment itself or the software that runs it. In these cases, procurement may be better off dealing with one party who is responsible for both. Furthermore, providers may not always be able to provide a quote due to the equipment type, or the pricing may not always be lower. As a final point, it is

important to note that that many departments may be hesitant to trust that a program provider, as a third-party, will keep the equipment in top shape, especially when that asset is critical to operations. In time, positive testimonials around campus will sway some, but the concept will always be a hard sell to others.

Do Equipment Maintenance Management Programs Really Work?

Two universities using different providers show solid evidence of success. Emory University is a private institution in Atlanta, Georgia, with a student enrollment of more than 14,000 and yearly expenditures topping \$2.75 billion. Since January 2012, Emory has engaged Remi as the provider for its EMM program. Remi was chosen through a competitive process requiring potential providers to submit bids covering all equipment in four departments across campus. Currently, the program covers approximately 150 pieces of equipment (40 manufacturers) throughout 50 departments. The largest equipment category covered is laboratory, due to the parameters set by the original agreement, but IT equipment has also been included within the last year. The service performed on campus, as a result, is approximately 100 repairs and 70 visits for preventative maintenance. Based on a direct comparison, Emory has saved more than \$210,000, equating to an average benefit of 25 percent. Much of the program's success has been due to procurement's proactive approach: When a requisition for a service agreement workflows through procurement, the sourcing team immediately contacts Remi to obtain a competitive bid, which is returned within three business days. Procurement then reaches out directly to the customer, who makes the final decision. Most Emory departments go with Remi and are pleased with the service.

Rensselaer Polytechnic Institute (RPI) in Troy, New York, is also a private institution. It has a student enrollment of close to 7,000 and yearly expenditures of approximately \$450 million. For its program, RPI has been using Specialty Underwriters for approximately two years. RPI engaged Specialty Underwriters through the contract offered by E&I and welcomed the opportunity that the relationship would provide both the campus customers and procurement. Currently, the program covers approximately 40 pieces of equipment (14 manufacturers) throughout 18 departments. The largest grouping covered is laboratory. Equipment in IT and library services rank high as well. RPI has saved approximately \$50,000, equating to an average

benefit of 21 percent. To help procurement identify savings opportunities, Specialty Underwriters has provided RPI with a pricing matrix showing a clearly identified discount structure. RPI also actively seeks competitive quotes from Specialty Underwriters when OEM quotes are presented. When they approach customers regarding the savings, all have agreed to make the switch. Most impressively, there have been no customer complaints.

Conclusion

Despite budget challenges—and often because of them—the mission of procurement remains in providing valuable sourcing solutions. EMM programs provide the needed answer for those departments that may be faced with foregoing service agreements altogether because of cost or the time needed to manage multiple agreements. While these programs are not yet widely utilized throughout higher education, they can deliver both cost savings and efficiency. As success stories continue to spread, EMM is sure to challenge the longstanding expectations of OEM service and pricing.



Finesha Colton-Lee, CPSM is the Assistant Director of Procurement Operations for Emory University. Her role includes oversight and strategic development of procurement systems, the Corporate and Purchasing Card Programs, inbound and outbound logistics, cellular and data coverage, and building operations. Due to a decade of experience in medical research, she also serves as a resource in scientific purchasing. Finesha has a B.S. in Biology from the University of Georgia, an M.B.A. from Emory University, and is in the final semester of earning a Juris Master degree from Emory Law. Email: finesha.lee@emory.edu.



Ron Moraski, Director of Procurement Services for Rensselaer Polytechnic Institute, provides oversight of the staff of sourcing managers, systems analysts, and administrative support. Ron also oversees the institute's stockroom functions for critical maintenance, repair, and operations-related items. Prior to joining Rensselaer, Ron garnered nearly 20 years of experience in supply chain management with three major retailers. He has had responsibility for inventory management, budget planning and allocation, policy and procedure, as well as coordinating many systems implementations. Ron holds an A.S. in Liberal Arts from Hudson Valley Community College and a B.S. in Business Management and Marketing from Boston University. Email: morasr@rpi.edu.

Managing liability and reputational risks for academic institutions: What you should know.

Academic think tanks have assisted in the pursuit of reducing global risks across supply chains for decades now. Compiling, filtering and managing risk factors associated with partners and suppliers has since become routine for procurement professionals who must be masters of uncovering and assessing risks associated with doing business with third parties.

Risks to institutions and their supply chains are many and varied. These include liability risks for on-site contractors, product liability risks for trademarked items, the risk of unfair practices or bids, contract language risks and much more.

There are many ways to meet these strategic risk-monitoring needs—but what about reputational risk and media monitoring? Are there solutions that can also help institutions perform these vital assessments? Academic institutions are especially vulnerable to reputational risks, as bad press and negative news associated with a supplier or partner can reflect on the institution itself and result in lower enrollment numbers and alumni donations.

You may have heard of LexisNexis®, a great source of business news and legal intelligence, but did you know that many procurement professionals are turning to LexisNexis solutions to monitor supply risks—including reputational risks?

Here are three smart ways you can use LexisNexis solutions to help minimize risks to your institution:

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Advanced risk-monitoring tools like LexisNexis SmartWatch® can alert you to possible supply chain risks from a single reporting dashboard. Tools like this leverage trusted market intelligence that enables fast assessment of your suppliers' current risk levels. This can help you anticipate and minimize supply chain disruptions, prevent litigation and protect your corporate brand.

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With an institutional news distribution service like LexisNexis® Publisher, you can deliver breaking news on trending topics company-wide. This helps your institution stay up to date on competitors and industry news, and ensures the right people have access to mission-critical information at all times—even when traveling.

Information is easy to come by these days—but determining the relevance of that information and turning it into actionable insights is tougher than ever before. That's why curated risk management tools like LexisNexis® Supply Management Solutions are so important.

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Why Are Green Procurement and Sustainability Growing?

by Brian K. Yeoman
NAEP

The NAEP Annual Meeting in Louisville this past May and a session on the five-year trend of green procurement in higher education got me thinking about the bigger picture. The how and why of the fuelling of our growth and adoption of policy and procedure caught my attention. So after scanning some of the business literature on green procurement and sustainability, I share these thoughts and conclusions here.

In both the private sector and in higher education, making “the business case” has long been the holy grail of green procurement and sustainability advocates. After all, one of the biggest challenges over the years has been overcoming the perception that green procurement costs more. The argument goes: if green procurement doesn’t create value, we should ask ourselves “so what, who cares, and why?”—because if we can’t address those simple questions, why bother to keep on moving forward?

For years, the response to the business case question alternately focused on creating competitive advantage, cost cutting, or greenwashing. The advocates were making progress, but it was slow and often divisive. Other aspects of green procurement to be weighed were transparency, disclosure, corporate social responsibility, and risk. These additional considerations made a difference. In the ensuing five years since we began surveying the sector, investors—and not just institutional investors—have increasingly been focusing their attention on these aspects of corporate and institutional governance. This interest and pressure push green procurement, along with sustainability, into the boardroom. Senior managers needed to respond, and they have.

Enter the chief financial officer, historically an outsider to most leadership conversations about sustainability (which was viewed by the financial men and women as “too soft” to be relevant). That has changed. In one instance of which I am aware, the transformation was so powerful that the individual became known as a “bean planter” as opposed to “bean counter.” Now that is really changing.



The literature clearly illustrates that the Big Four accounting firms have taken notice and acted. They see new opportunities in helping organizations bring the same level of diligence to sustainability reporting as they apply to financial reporting, and nothing makes for quicker change than when the chief financial officer is made to look good and offered reduced risk.

A critical requirement for this professional assistance to be real is data. We all have heard the mantra, you can’t manage it if you don’t measure it. The ascendance of this mindset in the sustainability arena has led to significant investments in systems to capture more and better data.

What drivers then have led to this willingness to invest in green procurement and sustainability? A sample of the literature indicates that the leading issues are: greenhouse gas emissions reporting, both mobile and indirect; disclosure of toxic ingredients and off gassing in products and services; predictable and reliable access to water; secure energy supplies; and access to raw materials. Why are these issues the drivers? They are increasingly seen as material risk factors that warrant scrutiny by stakeholders, shareholders, alumni, customers, students, employees, unions, regulators, and the public. The pressure exerted by interest groups has resulted in growing calls

for transparency and disclosure of results in green procurement, social responsibility, and sustainability. Institutions must respond, and to do so requires accurate data captured at the point of acquisition in the supply chain.

Perception is reality in the modern world, and it continues to play a strong role in driving the growth and market penetration of green procurement and sustainability. Interestingly, public relations-type ratings (such as those by US News & World Report, Princeton Review, and trade journals) are not being taken all that seriously by the rated organizations.

Senior leadership wants and needs data. In today’s data-driven decision-making, the collection and dissemination of key data to the boardroom is happening quickly. It is moving organizations to systems operated by independent parties using robust systems to rank and compare performance against standard. Examples are the Sustainability Tracking, Assessment & Rating System (STARS sponsored by the Association for the Advancement of Sustainability in Higher Education [AASHE]) and The Carbon Disclosure Project’s (CDP) annual disclosure of CO₂e.

Green Biz reports, “Shareholder resolutions focusing on social and environmental issues made up the largest portion of all shareholder



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proposals in 2011 and 2012.” TIAA-CREF, the giant financial services institution, issued the following advisement in 2012.

“We believe that companies and investors should take steps now to address the issue of global warming. As investors, we are concerned that the cost of global warming in decades to come may rise as high as 3% of world GDP per year. In the nearer term, companies need to be prepared for upcoming legislation and regulation that will impose costs on the burning of fossil fuels.

“As owners of companies, we communicate to management that, as investors, we believe that they should develop strategies for combating climate change. We have voted in favor of proxy resolutions asking companies to report on their approach to this issue. We have also written directly to over 150 companies to ask them to report on their climate strategies through a widely accepted mechanism called the Carbon Disclosure Project. To date approximately 21% of companies we have contacted have agreed to do so, with several more indicating their intention to do so in the future.”

In higher education, we see the emergence of campaigns aimed at institutional endowment port-

folios for divesting from carbon-intense companies. These types of actions further push green procurement and sustainability into the boardroom.

Shareholders aren't the only ones concerned about the impact of sustainability issues. Regulators are as well, and not just the EPA. The Securities & Exchange Commission (SEC) has spoken on the issue. It advised companies of its responsibility to disclose material risks related to climate change. It noted that a company's CEO and CFO must certify that the company has installed “controls and procedures” enabling it to discharge its climate change disclosure responsibilities. That placed sustainability directly into the realm of financial controls and financial risk management, and it correspondingly elevated green procurement.

Thus, the growth of sustainability reports in recent years. But it does not stop there. The newest development in green procurement and sustainability reporting is the combination of sustainability metrics and conventional financial reporting. An early adopter, the CFO of UPS, gave a speech at the Boston College Center for Corporate Citizenship on “Five Reasons the CFO Should Care about Sustainability.” In the speech he cited cutting costs, mitigating risks, generating

revenue, driving innovation, and improving employee development and retention. “The one thing Wall Street hates the most is surprise, so when a company confidently talks about how it will reduce risks and be successful for the long term, Wall Street listens.”

The literature is clear that green procurement and sustainability are inextricably linked, and that it is not a fad. It is real and here to stay, buttressing the findings of the NAEP Green Procurement Survey. Now it is much clearer where our growth is coming from and how deep the commitment is. Thank you for continuing to participate in the survey and thank you for contributing to the dialogue. We look forward to many years of collaboration, knowing all along that you, too, can do great things.



Brian K. Yeoman is Director of Sustainable Leadership at NAEP and is the retired Associate Vice President for Facilities Planning and Campus Development at the University of Texas Health Science Center at Houston. Email: byeoman@c40.org.

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How to Build a Better Procurement Department

by Ted Johnson

University of California, San Diego

As the procurement function on campus continues to add value beyond the transactional realm, we need to reconsider our strategies for hiring the kind of staff that can support the expanded procurement value proposition. In order to provide tangible and quantifiable value to our clients, we need to develop the value proposition itself to include areas that historically did not fall under procurement. The reality is that, with technology solutions that have automated much of the procure-to-pay process, our role relative to the obvious aspects of supply management has become less pronounced; clients independently search for products through e-Procurement systems, push a button, and expect the goods to arrive the next day. This practice could lead some to conclude that, with this degree of automation, procurement should be able to reduce staff and associated skill sets. I argue that automating the transactional portions of the procurement process will allow us to expand our strategic offerings to the campus, thus requiring us to redefine what a Procurement Department looks like.

Using the premise that we must now expand our offering to include programs and activities that demonstrate quantifiable value beyond what is traditionally expected of the procurement function, I believe that the following components are essential to redefining the role of procurement in an organization.

1. Don't hire only procurement people.

The procurement profession is increasingly expanding its scope to include areas that intersect with finance, operations, legal, sales and supply management. There is sufficient merit to consider hiring individuals with these backgrounds for the purpose of building an organization that can understand and contribute to the comprehensive procure-to-pay to fulfillment cycle.

2. Start with an analytics function.

While not all organizations have the financial or human bandwidth to establish a dedicated analytics group, it is extremely important that analytics be legitimized as a function within procurement, even in a limited form. Analytics can often provide

the roadmap and justification for prioritizing non-traditional, value-added activities, as well as the required resources to manage them. Analytics are also essential for demonstrating ongoing success through tools, such as executive data dashboards, cost/benefit tracking tools, etc.

3. Recruit subject matter experts directly from the lab or from your suppliers.

Suppliers have recently shifted their hiring process away from the polished salespeople of years past to subject-matter experts who can sell based on first-hand experience, utilizing or developing the products they represent. This technique provides instant credibility, particularly when approaching engineers and researchers, where product and technology choices have significant financial and academic impact. To provide value to our clients as well as to our supplier partners, procurement should hire people with backgrounds that parallel those of the sales organizations in order to establish a similar level of technical credibility—coupled with the objectivity that will help facilitate the best overall decision.

4. Hire students.

It is surprising that many of us in higher education do not utilize students at all or limit their scope to office or clerical work. For individuals who have been part of the workforce for a while, experience often serves as a predictor for what is possible. This can, at times, hinder innovation. Students offer a fresh and somewhat innocent perspective that can help counter the natural conservatism that can build over time. Business students, in particular, can offer an academic viewpoint that often leads to elegant and creative solutions that would not have evolved through a traditional thought-process. Student interns can also serve as an excellent way to obtain permanent employees when positions become available.

5. Think program management.

In addition to the sourcing/buying workload, procurement should focus on identifying and

managing broad-based programs that will result in a shift to the procurement process. Although these programs can be related to strategic sourcing initiatives, they often involve process enhancements and improvements that will produce operational efficiencies and associated savings. The skill sets needed to manage these programs are often different from those needed for commodity management. Individuals with a program management background can drive larger initiatives forward in a systematic manner, while effectively managing both internal and external stakeholders who contribute to the process. If hiring a program manager from the outside is not an option, Program Management Certification (PMP) is something to seriously consider for existing staff members.

6. Market your success.

Connecting with campus constituents and peers is critical; sharing what you are doing generates dialogue and can spawn new ideas. It can also demonstrate procurement's investment in what is going on in the labs and in the classrooms, eliminating the perception that the administrative operations are disconnected policy-police. Tactical outreach and communications that are accessible, straightforward, and emotive help shape campus perception of the value provided by procurement.

It is difficult to reconfigure an organization overnight, particularly for those of us working in the public sector, where the transition must be gradual and deliberate. But making new hiring decisions needs to be based on your long-term visions for the organization, not just those that meet short-term, immediate needs.



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What I Have Learned in the Last 75 Years

Part Four

by **Bob Ashby, C.P.M., CPCM**

University of Nevada, Las Vegas (retired)

This is the last in a four-part series in which I, in celebration of my 75th year, try to condense what I have learned in those years to the four most important lessons and then share them with you. Since I originally came up with seven lessons, not four, I relied on you, my readers, to help me pare the list.

In the Winter 2013 issue, I addressed the first lesson: “Life is easier if you try to get along with folks rather than imposing your will on them.”

In the Spring 2014 edition, I addressed the next issue: “There ain’t a horse that can’t be rode or a man who can’t be throwd.”

In the Summer 2014 issue, I addressed your third choice—mentoring. Writing that article brought to mind many of the wonderful people I met in my personal and working lives, who took the time to take this lump of coal and try to turn it into a diamond. It also reinforced the importance of my continuing to pay it forward by mentoring others.

Of the remaining four lessons, you asked that I combine these two into one:

- Always be prepared, because it would be a shame to miss out on that special someone or special job simply because you weren’t.
- It is never too late to learn and to improve yourself for the sole sake of, well, learning and improving yourself.

After thinking about it, I realized there is a corollary to these two: Always have a Plan B. Consider this story.

In high school, Amberly Snyder was passionate about horses and rodeos, competing in barrel racing, pole bending, and break-away roping. By her senior year, she was the President of Utah’s Future Farmers of America and was 10th in the world in the all-around.

Following the first two bullet points (above), she was prepared to live her life on the back of a horse, which, she said, “is the happiest place on earth for me.” Likewise her passion—her love of horses and rodeos—kept her learning and improving, so that she could become the best of the best. She was, as she says, “The happiest girl in the world, hands down.”

In spite of her always preparing and always learning, circumstances one day changed her world dramatically.

“Opportunity is missed by most people because it is dressed in overalls and looks like work.”

— THOMAS EDISON —

While driving to Denver to compete in a rodeo, she looked down to check her map, strayed into the next lane, over-corrected, hit a fence post alongside the road, was thrown from the car, and became paralyzed from the waist down. The doctors said she’d never walk again, and even worse for Amberly, they said she’d never ride or rodeo again. No one prepares for such a devastating occurrence!

Hopefully, nothing this traumatic will happen to any of us. But we might be downsized; our position might be eliminated; we might get passed over for promotions; or we might not be hired for positions for which we believe we are qualified. So, what would you do if your working life came crashing down?

What did Amberly do? She came up with a Plan B. Today, someone helps her out of her wheelchair and onto her horse. Ingeniously, she has a seat belt that hooks behind her seat on her saddle then comes around her to hold her in place. Velcro ties anchor her legs. She came back not as an observer, but as a competitor. She is awesome to watch!

Her story is one of triumph over tragedy, one of not giving up on her dream. It all boiled down to the fact that success comes once you determine that you’ll never give up, and that you’ll keep preparing, learning, and always be willing to develop a Plan B, if that is what it takes.

On the other hand, we have all seen the polar opposite of Amberly, the one who does not prepare, does not want to learn new techniques, never has a creative thought, and has not prepared a Plan B. Sadly, some of us exemplify Confucius’ saying that “One who wants to do something will find a way; one who doesn’t will find an excuse.”

While at the University of Nevada-Las Vegas, a “non-Amberly” clerk applied for a buyer position. She announced that the job should be hers because of her seniority. Without a degree, a certification, or any buying experience, she was denied the promotion. She deemed my decision unfair since, due to her having two kids prior to age 19, she had not had the time or money necessary to obtain an education and, thus, never had an opportunity to gain the required buying experience. She did not accept the reality that we all make life choices and then have to live with them. She agreed that she was not prepared to handle the duties of the buyer but promised that, if given the promotion, she would then start preparing.

She missed the point Thomas Edison made when he said, “Opportunity is missed by most people because it is dressed in overalls and looks like work.” Only after missing the opportunity did she offer to don the overalls.

Continued on page 30

Saving Money on Campus: Five Things You Can Learn From Hospitals

BUYING MEDICAL PRODUCTS and pharmaceuticals for your student health center, athletics program, veterinary school, or allied health programs can be daunting. If you leave procurement to the end-user departments, you are not alone. But giving each department carte blanche to manage its own procurement often results in higher costs because department administrators generally lack the expertise needed to obtain the best pricing. Over the past 30 years, hospitals have become experts in managing their supply costs—their second largest expense after labor. Universities can apply these 5 principles that hospitals have mastered to help their departments better manage procurement of medical and pharmaceutical products.

Competitive bidding is not a requirement—even when it is.

Conducting a competitive bid for each individual purchase exceeding a certain dollar value might seem like the best way to get the lowest price while main compliance with state bid requirements. But in reality, this approach can result in an administrative burden rife with inefficiencies. By participating in a group purchasing organization (GPO), universities can usually forego the bid process altogether and still secure the best price available because GPO contracts have already been competitively bid. When it comes to buying medical supplies on campus, joining a GPO that has wide reach in the health care market can help you gain significant savings over individual bids or even university-specific cooperative buying groups.

Focus on the overall cost, not just the price of the product.

Medical supplies and pharmaceuticals are rarely purchased directly from manufacturers. Rather, they are usually purchased from distributors that carry a wide range of products—everything from tongue depressors to intravenous solutions—from various brands. Your departments may try to negotiate prices with

distributors, but this approach offers limited savings potential because the distributors but this approach offers limited savings potential because the distributors only control a small percentage of the amount that appears on your invoice. Establishing contracts with each manufacturer that dictates what your distributors pay for the products enables you to control both the overall cost and the price of your purchase. Long-term price protection and additional rebates and incentives can also be built into these manufacturer contracts. If you have an associated medical center, you may even be able to access its manufacturer contracts for even more savings. This leads to a related topic. . . . Shopping around for the best price on every transaction is costing you more money. Purchasers of medical supplies for campus departments often approach the buying process as though they were purchasing household goods—shopping around for the best price and then selecting the cheapest, most reliable source based on limited information. Your faculty and staff may even “shop” on your e-procurement platform with your approved vendors because they believe this to be an effective method of bargain hunting. Shopping for the lowest price on each individual transaction, however, can be penny wise but pound foolish. In the medical and pharmaceutical marketplace, manufacturers reward brand loyalty with better pricing – even



when you do not buy directly from the manufacturer. If you always buy a certain brand of latex gloves, for example, the manufacturer of those gloves may be able to give you a lower price to reward you for that loyalty, even when you buy those gloves from a distributor. This would be the equivalent of getting Campbell's to agree to sell you their soup at a discount, no matter which store you buy it from, just because it is your favorite. If you have not set up your pricing with these incentives built in, then you are leaving money on the table. Health care GPO contracts are based on this model and can help you maximize your savings.

“In the medical and pharmaceutical marketplace, manufacturers reward brand loyalty with better pricing—even when you do not buy directly from the manufacturer.”

Know, then negotiate your distributor's markup.

Every customer's markup is different and is completely negotiable—in other words, you get to decide how much profit the distributor makes from you. If you don't know how much that is, it's probably too much. Markups can often be reduced by establishing a preferred distributor and working with all of your distributors to lower their overhead costs to serve you—for example, by reducing the number of deliveries per week or the number of delivery sites, moving to electronic ordering, or tightening up number of deliveries per week or the number of delivery sites, moving to electronic ordering, or tightening up your payment terms. Pharmaceuticals are often supplied using a cost-minus structure in which you actually pay

less than the distributor's cost of goods. Your GPO can help you evaluate your options and establish contracts with distributors and wholesalers that can offer an appropriate cost structure for your institution.

Buy medical supplies from a medical supply distributor; buy pharmaceuticals from a pharmacy wholesaler.

As obvious as this sounds, you may be surprised at how many universities buy their medical supplies from laboratory distributors, pharmaceuticals from medical suppliers, or both from a local mom-and-pop supplier of their athletics program. In doing so they are not only paying higher prices than necessary but also diluting the negotiating power of the entire campus. Lab suppliers usually do not have access to the reduced medical pricing—it isn't their core product offering. Such suppliers often use medical products to boost their margins. Similarly, you will inevitably pay more for pharmaceuticals if you buy them from a medical supplier rather than a pharmacy wholesaler because medical suppliers have higher overhead costs and thus higher markups. Buying products that are core to the seller's business always offers the best opportunity for cost savings. These proven strategies will help you control costs of medical products and pharmaceuticals across your entire campus.

Leveraging a GPO that has health care expertise can ease the burden of managing this process.

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At both the City of Albuquerque and at McCarran International Airport, I was passed over for promotions for which I thought my skill set clearly qualified me (significantly, my MBA, obtained as a 40th birthday present to myself) and that I wanted badly. My Plan B, though not as dramatic as Amberly's, was to be actively involved in leadership positions at the local and

national levels in both the National Purchasing Institute (NPI) and ISM. In those organizations, I cultivated a reputation for being a go-to guy. I knew that if a position did become available, I had to be prepared or I would lose out on the opportunity. Semper paratus (always prepared) is the motto of our U.S. Coast Guard. It is a good motto for all of us.

Whether you experience a devastating personal event as Amberly Snyder did, or undergo a less devastating business or career event, are you prepared to take a next step, or one in a different direction? If not, are you still learning, so that you can take advantage of an opportunity when it manifests itself? And equally important, do you, like Amberly, have the brains and mindset to develop a Plan B through preparation and continuous learning?

This whole lesson can be summed up by this quote credited to various authors: "Everything in your life is a reflection of a choice you have made. If you want a different result, make a different choice." Make a choice and then act on it, because if you're not willing to learn, no one can help you. If you're determined to learn, nothing can stop you.

I would like to hear your stories of how your education and/or preparation led you to the level you have reached, or will lead you once opportunity knocks on your door. I'd also like to hear about your Plan Bs.

I hope you have enjoyed reading my four lessons learned during this, my 75th year. Stay tuned, though, because the other two lessons learned are equally important and will be addressed in future issues of the Journal:

- Be ethical, since the number one asset we all have is our good name and reputation; and
- Have goals, since you'll never know where you are headed or when you have arrived if you don't plan your route first.

Are there other lessons you would like to see discussed? Write me at ashbybob@embarqmail.com.



Bob Ashby, C.P.M., CPCM, is retired from his position as Director of Purchasing and Contracts for the University of Nevada, Las

Vegas, where he also served as an Adjunct Professor in the Management Department. Bob has been active in NAEF since 1997. In 2006, he received NAEF's Distinguished Service Award, and in 2008, he won the newly established Mentor of the Year Award. NAEF renamed the award in his honor to the Bob Ashby Mentor of the Year Award in 2009. Email: ashbybob@embarqmail.com.

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Musings from Procurement Chairs of Multiple Educational Institutions

by **Gene Suwanski, C.P.M.**
College of DuPage

I am fortunate to have led purchasing operations at a major K-12 urban school system, a mega-community college, a renowned private research university, and a historic state university. The enjoyment, challenges, and difficulties of each assignment were different and yet extraordinarily similar. Some days I wondered if the similarities were merely my reluctance to recognize the organizational disparities as I tried to maintain a steady ship during trying times. Other days I observed many fundamental principles of human behavior as it played out, reacting to institutional policies, government regulations, and institutional initiatives—all overlaid with economic, social, environmental, competitive, and political preferences.

One thing that becomes apparent from this view of these different environments is a general sense of wellbeing and improvement when the change that a purchasing department provides actually makes things work better for the users of our services. We often talk of this as excellent customer service. I prefer to think of it as dynamic collaboration. That is, a service exchange whereby the customer's input/feedback and the purchasing staff's understanding/skill dovetail together to make good change happen. We learn, serve, and fulfill each other's needs via a nexus of information exchange.

This all comes about on a technology landscape of information benefits, or—depending on your capacity and aptitude for inter-connectivity—overload. The magnitude and speed of innovative devices and applications along with the skill sets to operate them necessitate a broader look at the playing field of purchasing activities. The base of transactional operations, a purchasing system, is now subject to being repurposed into myriad service support func-



tions. It could become: a purchasing operation as a shared-service center; the interface node within a communication network that joins outside institutions with your institution in a data warehouse for contracts and suppliers; a purchasing department in the finance office providing expenditure savings within total resource management; or a purchasing function being taught by purchasing staff during new employee orientation.

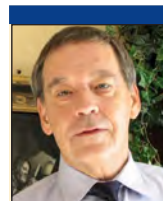
Actually, our current day technology allows for the commercial development of the first-ever, voice-activated requisition process. Follow that with seamless procure-to-pay transaction processing and—Ta Dah!—you have a fast-food-service-like purchasing process that the present generation of connected workforce wants and needs.

Heading up those diverse professionals is never a smooth operation. Complicating the leadership factor is the consideration of the

purchasing director's role. Business philosophy will determine that. The director may serve as the lead in a cross-functional team of distinct departments now combined for improved process. The director may be the deal-making control point for evaluating the pricing and market analytic skills of the staff professionals—who must be kept or let go from positions on the basis of economic results—in a procure to pay environment of ever-expanding contract management.

Before we can provide recommendations to the new “procurement squadron commanders in virtual space,” we need to recognize that the landing places must be paved with the “tarmac of education.”

From the vantage point of having been in the control tower, I suggest that each of us assess dynamic collaboration. The force is contained within the Combined Many.



Gene Suwanski, C.P.M., who recently retired as Purchasing Manager at College of DuPage, Glen Ellyn, Illinois, has more than 30 years of experience in public, private and nonprofit procurement,

during which he implemented numerous improvements designed to simplify processes and offer electronic purchasing solutions. His career history includes working as an independent consultant in higher education business; Interim Director of Purchasing at University of Illinois at Chicago UIC; Adjunct Professor, Center for Business and Economics at Elmhurst College, Illinois; Director of Procurement at the University of Chicago; and Director of Purchases, Chicago Public Schools. He served as Chair of the Big Ten Universities Buying Consortium (CICPC) for six years and as President at NAPM/ISM-Chicago. He has an MBA from the Quinlan School of Business, Loyola University, Chicago. Email: suwanski@cod.edu.

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