

**SUNY Potsdam
Administrative Unit
Assessment Summary Form**

Administrative Unit: *Regionals Procurement Services* **Unit Contact Name:** *Susie Cobb* **Date:** *10/14/2022*

Phone: *315-267-2140* **Email Address:** *cobbsm@potsdam.edu* **Assessment Year:**

PURPOSE

This annual assessment summary form provides the opportunity for units to follow-up on their previous assessment work and reports and to highlight actions taken to improve processes and/or efficiencies in functioning that lead to outcomes that benefits students, staff, or the college. These could be process changes or improvements in efficiency, skill level of staff, opportunities for the college, or other aspects over which the unit has a certain amount of control.

SECTION 1: PRIOR YEAR ASSESSMENT PLAN FOLLOW-UP

A key component of the continuous improvement assessment process is following up on [prior year assessment plans and reports](#). Review your prior year plan and report and select one of the desired goals and outcomes to comment on any changes or improvements resulting from actions taken.

Prior Year Assessment Plan – Desired Goal and Outcome(s)

Copy/Paste or enter the goals and outcomes from your prior plan that you wish to highlight and summarize. Also list any relevant results data and planned actions that may have been previously listed.

Goal:

Ensure timely payments of contracts and purchase orders.

Desired Outcomes/Objectives:

Streamline the receipt of invoices from vendors through our electronicinvoicing@potsdam.edu email and obtaining proper receipt of material for backup.

All deliveries to the campus need to go to the Central Receiving Department. Work with vendors/campus departments who are not in compliance to ensure future deliveries are properly received.

Assessment Methods and Target/Measures:

Maintain a log on a fiscal year basis of purchase orders that have not been delivered properly. If it is a specific recurring vendor or campus department work with them to be in compliance.

Based on the outcomes, collected data/results, and planned actions, please describe what specific actions were taken and the resulting impact, if any.

We implemented a new eProcurement System – Jaggaer – with SUNY Plattsburgh as a shared service. This allows us – in a comprehensive manner – to track all campus state-funded orders, including cycle times for requisition approval and payment of vouchers. We developed dashboards for our purchasing and payments manage to facilitate monitoring requisitions and vouchers for timely completion. Jaggaer also supports timely processing by receiving vouchers from enabled suppliers as data files, greatly reducing manual processing and increasing their efficiency and timeliness. We have also standardized our POs to ensure every PO includes a notification to vendors to send to our electronicinvoice@potsdam.edu email account.

Jaggaer’s implementation also greatly enhanced our ability to standardize and monitor campus receiving to ensure compliance with state requirements. A dedicated receiving module has been implemented that allows for seamless integration with POs and vouchers. Our voucher workflow requires receiving documents to be created for most orders and flags orders where there are mismatches (e.g. invoice received but no documentation of receiver). We are able to monitor orders effectively to ensure they are being received by Central Receiving. As part of our onboarding, we provided specific in-person training to the receiving department on their responsibilities. We also trained departments to clarify situations under which the department needed to receive items vs. central receiving and had a specific focus session for departments on entering receivers. Where necessary, we have notified departments and vendors on when items were not sent to central receiving. The accounts payable process remains a continuing education but anecdotal feedback has been positive on these trainings.

SECTION 2: ADDITIONAL ASSESSMENT HIGHLIGHTS (optional)

Assessment activity can take place that is not directly tied to previously submitted plans and reports. Please use this space to share any assessment success stories from this past year. What did you assess and how? What were the results? What did you learn from it and do as a result?

One of the benefits of shared services has been the ability for staff to step back from transactional day-to-day work and take time to evaluate the effectiveness of our efforts. The Regional Procurement Services Leadership Team meets on a weekly basis and full staff meetings have been held monthly. In addition, weekly focus sessions with staff from AP/Purchasing have occurred regularly throughout the year. These meetings have provided opportunities to identify issues of concern and opportunities for improvement.

The availability of comprehensive data from Jaggaer has provided many new avenues to identify improvements to services. For example, challenges with some vendors not receiving orders resulted in a new vendor follow-up process, challenges with supporting a new process for teacher stipends resulted in a

new dedicated online form for this process, concerns about the new supplier process resulted in a change to the requisition workflow to route new orders to procurement immediately, and concerns from departments about monitoring their open and closed orders resulted in a new dashboard under development to provide greater clarity into open and closed orders.

Finally, implementation has provided new data to measure our success. We have also been able to benchmark our results against other SUNY campuses, data which has shown that Plattsburgh and Potsdam have accomplished an implementation that is unrivaled amongst SUNY comprehensive campuses. With this system, many opportunities exist in the future to support data-driven decisions to improve services and facilitate excellence in procurement services towards procurement excellence.