

**SUNY Potsdam  
Administrative Unit Assessment Plan**

**Administrative Unit: Purchasing & Payables**

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**Mission Statement:** The Purchasing & Payables Office is a group of dedicated individuals committed to providing exceptional customer service to our campus and vendor communities, while procuring the highest quality products and services at the lowest possible cost. Our office strives to provide for the various needs of the campus community while staying within the laws and regulations of the New York State Office of the State Comptroller, the New York State Office of General Services and the State University of New York.

Goals	Desired Outcomes/Objectives	Assessment Methods and Targets/Measures
Procure commodities and services needed by campus in a timely manner and communicating the submission of orders to appropriate departments.	To have a consistent minimal <b>2 to 3</b> day backlog of unprocessed orders.	Request feedback from requisitioner via a satisfaction survey on a quarterly basis.
Travel reimbursements paperwork submitted timely and completely.	Policy awareness promoted via small group information sessions on travel every September for campus faculty and staff.  Stakeholders follow SUNY, campus and departmental policy and submit their requests properly with appropriate documentation.	Develop and maintain a log of travel that cannot be processed because paperwork is incomplete. Look for repeat offenders and work with the traveler on an individual basis.
Improve controls over purchasing policy and legal compliance, and allow for lead time needed to negotiate with vendor legal and SUNY Legal.	Improve campus awareness of purchasing laws, regulations and policies with training and communication. Maintain a calendar and communicate with users and management to ensure sufficient time to implement desired service well in advance of deadline.	Request comments and feedback from campus departments. Develop and maintain a contract/agreement spreadsheet to capture timeframe needed for process to be completed.

<p>SUNY Reporting is done completely, accurately and timely.</p>	<p>Implement a SUNY Report calendar of due dates and work throughout fiscal year on report information so it is readily available upon due date.</p>	<p>Track on report calendar when initial request was sent, when report was submitted and due date.</p>
<p>Ensure timely payments of contracts and purchase orders.</p>	<p>Streamline the receipt of invoices from vendors through our <a href="mailto:electronicinvoicing@potsdam.edu">electronicinvoicing@potsdam.edu</a> email and obtaining proper receipt of material for backup. All deliveries to the campus need to go to Central Receiving Department. Work with vendors/campus depts who are not in compliance to ensure future deliveries are properly received.</p>	<p>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.</p>
<p>Potential RFPs and IFBs</p>	<p>Share with campus the SUNY Wide contracts that are available and require no bidding. Work with departments who have larger budgets about timeframe needed to develop and advertise RFPs or IFBs.</p>	<p>Add column to current contract spreadsheet to track when initial request was received and time frame it took to process. Request comments and feedback from stakeholder on their procurement process experience.</p>
<p>Meet or exceed MWBE goals</p>	<p>Current MWBE goals are 30% for OTPS spending. 15% with New York State Certified MWBE and 15% for New York State Certified WBE vendors.</p>	<p>Review the quarterly MWBE Expenditure report to ensure the campus is meeting their goals. If goals are not met see which area needs improvement and do outreach with vendor community to educate campus of opportunities.</p>