SUNY Potsdam
Administrative Unit
Assessment Plan

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PURPOSE/
Administrative Assessment is an ongoing process that allows a unit to evaluate and – where necessary – improve its programs, services and operations. Assessment is a systematic approach to demonstrate continuous improvement in programs, services and operations. This template is to be used when creating your assessment plan. Assessment plans should be measurable, meaningful and manageable.

UNIT MISSION STATEMENT
The mission of the Regional Procurement Services team is to support the procurement needs of SUNY Plattsburgh and Potsdam. Our knowledgeable staff provide exceptional service to help our customers fulfill their needs while ensuring a fair and competitive process.

Vision
We will be the leader in SUNY shared procurement services, modeling a pathway to deliver cost savings, efficiencies, and compliance.

Values
- Professional — We will act in accordance with the obligations and responsibilities of the procurement profession.
- Responsive — We will act with timeliness to support the evolving needs of our campus communities.
- Organized — We will act in a coordinated manner to ensure efficient processing.
- Capable — We will act to improve our skills and evolve our services through innovation and ongoing education.
- United — We will act as one shared services team, supporting each other and our campuses.
- Respectful — We will act in a positive, patient, and understanding manner, recognizing the diversity of the customers we serve.
- Ethical — We will act with integrity, fairness, and honesty while holding ourselves accountable for our actions.

GOAL #1
Reminder: Generally speaking, goals should be grounded in the mission of the unit, be broad, and linked to the overall institutional priorities and goals. They should focus on strengthening and improving critical functions, services and processes and reflect the most important/urgent priorities of the unit.

Improve efficiencies through the implementation of a comprehensive eProcurement System.

GOAL #1 - WHAT INSTITUTIONAL PRIORITY AREA(S) DOES THIS GOAL LINK TO? (Select all that apply) ☐ Retention and Enrollment X Financial Stability and Analysis ☐ Academic Programs and Planning ☐ Strengthening Community Connections ☐ Diversity, Equity, Inclusion, & Belonging	**Briefly describe the link between goal #1 and the institutional priority area(s) selected.** Implementation of a comprehensive eProcurement System provides opportunities to leverage technology to seamlessly facilitate processing of purchase requisitions and payments reducing costs compared to historic procurement processes, and supports stronger compliance with NYS Procurement Laws reducing financial and audit risks. Implementing the system also supports institutional decision making by providing a far greater level of transparency into campus procurements.

GOAL #1 – DESIRED OUTCOMES AND OBJECTIVES

Tip: Outcomes and objectives should be SMART…   Specific, Measurable, Achievable, Relevant, Time-bound

- Objective # 1: Increase the percentage of vendor voucher payments made using Jaggaer instead of FMS to 98% by 2025-26.
- Objective # 2: Streamline Jaggaer purchase requisition processes to decrease cycle time to 85% completion within 5 Days by 2025-26.
- Objective # 3: Working in collaboration with relevant partners at SUNY Plattsburgh and Potsdam, integrate Research Foundation purchasing into eProcurement by Summer 2023.
- Objective # 4: Develop five (5) new forms with workflow in Jaggaer to streamline purchase to payment process by FY 2023-24. Such forms may include: Travel Authorization/Requisition, Travel Voucher/Claim for Reimbursement, Honorarium Payment; and Teacher Stipend (Plattsburgh).
- Objective # 5: Implement and use the Jaggaer Sourcing Module for Sourcing Events Greater than $50,000 by Summer 2024.

GOAL #1 – ASSESSMENT METHODS, MEASURES, AND TARGETS

Reminder: These should be aligned with the objectives being assessed. Also, consider using a combination of direct and indirect measures. Be sure to include specific targets.

- Objective # 1: BI Data Queries of vouchers by voucher source.
- Objective # 2: Jaggaer Cycle Time reports
- Objective # 3: Number of Successful POs for the Research Foundation
- Objective # 4: Jaggaer reports of forms with completed workflow.
- Objective # 5: Jaggaer reports of completed sourcing events deemed successful if a contract was signed.

Targets:
- Objective # 1: Increase the percentage of vendor voucher payments made using Jaggaer instead of FMS to **98%** by **2025-26.**
  - Annual Targets: FY 2022-23: 90%, FY 2023-24: 93%; FY 2024-2025: 96%, FY 2025-2026: 98%
- Objective # 2: Streamline Jaggaer purchase requisition processes to decrease cycle time to **85%** completion within 5 Days by **2025-26**.
  - Annual Targets: FY 2022-23: 70%; FY 2023-24: 75%; FY 2024-2025: 80%; FY 2025-2026: 85%
- Objective # 3: Working in collaboration with relevant partners at SUNY Plattsburgh and Potsdam, **integrate Research Foundation purchasing** into eProcurement by Summer 2023.

- o Annual Targets: <u>FY 2023-24</u>: Process <u>50%</u> of RF Purchases through Jaggaer; <u>FY 2024-25</u>: Process <u>75%</u> of RF Purchases through Jaggaer; <u>FY 2025-26</u>: Process <u>90%</u> of RF Purchases through Jaggaer.
- Objective # 4: Develop **five (5) new forms** with workflow in Jaggaer to streamline purchase to payment process by FY 2023-24. Such forms may include: Travel Authorization/Requisition, Travel Voucher/Claim for Reimbursement, Honorarium Payment; and Teacher Stipend (Plattsburgh).
- Objective # 5: **Implement and use the Jaggaer Sourcing Module** for Sourcing Events Greater than $50,000 by Summer 2024.
  - o Annual Objective Breakdown: <u>FY 2024-25</u>: Conduct five <u>(5)</u> successful sourcing events using the Sourcing Module; <u>FY 2025-26</u>: Conduct <u>ten</u> successful sourcing events using the Sourcing Module.

GOAL #2

Increase utilization of State Contract and Certified Minority/Women Business Enterprises (M/WBE) and Service-Disabled Veteran-Owned Business (SDVOB) Vendors.

GOAL #2 - WHAT INSTITUTIONAL PRIORITY AREA(S) DOES THIS GOAL LINK TO? (Select all that apply) ☐ Retention and Enrollment X Financial Stability and Analysis ☐ Academic Programs and Planning ☐ Strengthening Community Connections X Diversity, Equity, Inclusion, and Belonging	**Briefly describe the link between goal #2 and institutional priority area(s) selected.** Increasing utilization of state contracts and purchases from certified M/WBE and SDVOB vendors promotes financial stability and diversity, equity, and inclusion. When buying from state contracts, the College can be ensured that it is obtaining reasonable prices for goods and services being purchased, reducing the costs incurred by non-contract spend such as historically been done when Procurement Cards were widely utilized. In addition, purchasing from MWBE and SDVOB vendors College supports state public policy goals of creating more opportunities for MWBE / SDVOB businesses as outlined under NYS Executive Law Article 15-A.

GOAL #2 – DESIRED OUTCOMES AND OBJECTIVES
Tip: Outcomes and objectives should be SMART…   <u>S</u>pecific, <u>M</u>easurable, <u>A</u>chievable, <u>R</u>elevant, <u>T</u>ime-bound

- Objective # 1: Increase the percentage of non-form purchases from Punchouts/Hosted Catalogs to 35% by Fiscal Year 2025-26.
- Objective # 2: Increase the number of state contract or MWBE/SDVOB punchouts suppliers by 2-3 annually to increase opportunities for contract M/WBE purchases and evaluate and remove under-utilized non-contract based punchouts/hosted catalogs.
- Objective # 3: Promote opportunities to utilize MWBE and SDVOB vendors for discretionary procurements up to $500,000.00 by Summer 2024.

GOAL #2 – ASSESSMENT METHODS, MEASURES, AND TARGETS

Reminder: These should be aligned with the objectives being assessed. Also, consider using a combination of direct and indirect measures. Be sure to include specific targets.

- Objective # 1: Jaggaer reports of forms POs from punchouts/hosted catalogs.
- Objective # 2: Number of punchouts implemented in Jaggaer and utilization rate.
- Objective # 3: Number of training materials (website, guides, communications) developed, customers notified, and number of large dollar $50,000 sourcing events.

Targets:

- Objective # 1: Increase the percentage of non-form purchases from Punchouts/Hosted Catalogs to **35%** by Fiscal Year **2025-26**.
    - Annual Targets: FY 2022-23: 22%, FY 2023-24: 26%; FY 2024-2025: 30%, FY 2025-2026: 35%
- Objective # 2: Increase the number of state contract or MWBE/SDVOB punchouts suppliers by **2-3 annually** to increase opportunities for contract M/WBE purchases and evaluate and remove under-utilized non-contract based punchouts/hosted catalogs.
- Objective # 3: **Promote opportunities** to utilize MWBE and SDVOB vendors for discretionary procurements up to $500,000.00 by Summer 2024.

GOAL #3

Increase campus awareness and familiarity with New York State Procurement Requirements

GOAL #3 - WHAT INSTITUTIONAL PRIORITY AREA(S) DOES THIS GOAL LINK TO? (Select all that apply) ☐ Retention and Enrollment Ⓧ Financial Stability and Analysis ☐ Academic Programs and Planning ☐ Strengthening Community Connections ☐ Diversity, Equity, Inclusion, & Belonging	**Briefly describe the link between goal #3 and institutional priority area(s) selected.** Increased literacy and understanding of New York State procurement requirements will empower end users to understand their responsibility and support stronger fiscal stewardship, while promoting opportunities to reduce waste.

GOAL #3 – DESIRED OUTCOMES AND OBJECTIVES

Tip: Outcomes and objectives should be SMART…   Specific, Measurable, Achievable, Relevant, Time-bound

1. Objective # 1: Provide a minimum of Two (2) Travel 101 and Purchasing 101 Training Sessions at SUNY Potsdam annually with an attendance goal of 60 individuals in FY 2022-23.
2. Objective # 2. Increase the percentage of campus requisitioners who have attended Purchasing 101 / Travel 101 in the past two years to 90% by FY 2025-26.
3. Objective # 3: Implement a survey for attendance at Travel 101 and Purchasing 101 Training Sessions to measure attendee perception of value of training with an annual average rating across all participants of 4.3 out of 5.0 in FY 2022-23 and thereafter

GOAL #3 – ASSESSMENT METHODS, MEASURES, AND TARGETS

Reminder: These should be aligned with the objectives being assessed. Also, consider using a combination of direct and indirect measures. Be sure to include specific targets.

1. Objective # 1: No. of training sessions held at SUNY Potsdam Annually / Count of Attendees
2. Objective # 2: Count of Attendees completed training in the past two years / number of active requisitioners in Jaggaer.
3. Objective # 3: Survey responses after training is offered (survey to be developed)

Targets

1. Objective # 1: Provide a minimum of Two (2) Travel 101 and Purchasing 101 Training Sessions at SUNY Potsdam annually with an attendance goal of **60** individuals in **FY 2022-23**.
2. Objective # 2. Increase the percentage of campus requisitioners who have attended Purchasing 101 / Travel 101 in the past two years to **90%** by FY **2025-26**.
3. Objective # 3: Implement a survey for attendance at Travel 101 and Purchasing 101 Training Sessions to measure attendee perception of value of training with an annual average rating across all participants of **4.3** out of **5.0** in **FY 2022-23** and thereafter