

**SUNY Potsdam
Administrative Unit
Assessment Summary Form**

Administrative Unit: *Regional Procurement Services*

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Assessment Year: *2022-2023*

PURPOSE

This annual assessment summary form provides the opportunity for units to follow-up on their assessment plans, track progress toward goals, 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: ASSESSMENT PLAN FOLLOW-UP

A key component of the continuous improvement assessment process is regularly following up on [your assessment plan](#). Please review your plan and select one-third of your unit goals, along with related desired outcomes and objectives to report on the progress made.

Selected Goal

Increase campus awareness and familiarity with New York State Procurement Requirements

Desired Outcomes/Objectives

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.

Related Targets/Measures

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.

Describe the progress made toward the selected goal and the related desired outcomes and objectives. Be sure to include steps taken and any information/data collected and results.

Jaggaer Basic User training sessions were in person on campus on both September 23, 2022, and January 19, 2023, and was well attended by the administrative assistants. While our target goal of 60 individuals was not met, we did have 40 in attendance.

Procurement 101 and Travel 101 training was held in person on campus on March 23, 2023. The Procurement 101 was attended by 10 administrative assistants, however the Travel 101 only had 3 in attendance.

Focus Sessions were held via Zoom in the fall and spring semesters to cover the following targeted areas of Jaggaer:

- Best Practices: Finding What You Need
- Open Session: Q & A
- Receivers (Cost, Quantity, and Partial)
- Non-encumbered v. Non-Catalog
- Comments and Communication
- What's Coming in 2023-2024
- Fiscal Year End
- Jaggaer Tips & Tricks
- Department Dashboard

These were very well attended by the administrative assistants and the trainings were all recorded and posted on our department webpage for future reference.

Based on the assessment data and information shared above, what planned actions were or will be taken as a result?

We will continue to reach out to the campus for Travel 101 training and Procurement 101 training to make them familiar of the common pitfalls as well as the OSC rules that our campus must follow for the use of state funds. We will hold at a minimum of two sessions each semester to continually educate the

campus on the changes to the NYS Procurement Requirements and will also offer to hold one on one meetings with the more frequent purchasers for the campus.

Procurement thresholds recently had a drastic change and we immediately reached out to the campus via email to let them know not only of the changes, but also the impact it will have on a procurement being successfully reviewed, advertised, and approved through the AG and OSC.

While we did not reach the goal of Objective #3 we will work with the Office of Institutional Effectiveness to develop a survey to send to campus constituents to measure the perception of the value of our training sessions on Travel 101 and Purchasing 101. A target deadline of 6/1/2024 is set so that we have time to evaluate what our training needs need to be in the summer and fall semester.

SECTION 2: ADDITIONAL ASSESSMENT ACTIVITY

We did a side-by-side comprehensive review of what the previous procurement legislation was and what the new legislation is effective 3/17/23. It was emailed to all campus employees outlining the immediate impact it has on our campus. One example of the impact is that OSC had 30 days to review a contract that had to be sent down for review and because of the lower thresholds and more contracts needing to be reviewed, the time was increased to 75 days.

Threshold Changes that were notable for contracts and purchase orders that must be sent to the Office of the Attorney General (OAG), and the State Comptroller for review and approval are as follows:

- All purchases for commodities, services, construction, and construction-related services valued at \$75,000 or more. The threshold was previously \$250,000.00. This includes purchases from NYS Preferred Sources, Minority and Women Business Enterprises (M/WBE), and Service-Disabled Veteran-Owned Business (SDVOB).
- All purchases utilizing and Office of General Services (OGS) centralized contract valued at \$200,000 or more. There was no requirement to do this previously.

Regional Procurement Services reviewed and identified procurements that would be impacted by this change and reached out to the departments with upcoming contract renewals.