

# Annual Report 2007 - 2008

## Part 1

### Section A

#### Unit Information

Unit:

Procurement Services

Mission Statement:

The Office of Procurement Services is dedicated to providing professional and efficient procurement services and supports the activities of the University which include: education, research and community service, through contracting for all commodities and services and through providing timely and accurate payment of all vendor invoices, employee reimbursements and travel. Procurement Services is responsible for maintaining procedures which foster fair and open competition, inspire public confidence that all contracts are awarded equitable and economically, and by acquiring the greatest possible value and quality in the services and products purchased with timely delivery.

### Section B

Unit Goals within Last Year's (2006-2007) Report

## **Strategic Plan Goal**

**With which 1 or 2 goals from the 8 current strategic plan goals does your 2007-2008 goal best align?**

5 – State of the Art Infrastructure

## **Unit Goal**

**Goal for 2007-2008**

Development of Procurement Task Group to work in conjunction with the ESAC Group to review and make recommendations for environmentally sound procurement strategies

**What actions have you taken to achieve this goal?**

A Procurement Task Group was developed with support from the ESAC Group. They meet on a quarterly basis to review and make recommendations concerning environmentally sound procurement strategies.

**What measures have you taken towards assessment of this goal?**

The Procurement Task Group has published on the Procurement Services website links to vendors website regarding sustainability in order to promote campus wide awareness.

**Describe the progress you have made toward attaining this goal including the anticipated completion date.**

The Procurement Task Group has been formed and quarterly meetings are ongoing.

**Describe how the results of assessments have been used to improve student learning or your department's activities.**

Procurement Services is currently educating university departments on the availability of recycled products as alternatives.

## Strategic Plan Goal

**With which 1 or 2 goals from the 8 current strategic plan goals does your 2007-2008 goal best align?**

7 – Community Leadership

## **Unit Goal**

**Goal for 2007-2008**

To identify local minority business enterprise vendors and assist them in their goal to do business with Florida Gulf Coast University.

**What actions have you taken to achieve this goal?**

Attended the Office of Supplier Diversity statewide Matchmaker Conference as well as the Regional Conference. We have established a DBE vendor trade show to be held on campus to introduce minority businesses to the campus community.

**What measures have you taken towards assessment of this goal?**

We continue to increase the number of minority businesses in our database by our outreach efforts.

**Describe the progress you have made toward attaining this goal including the anticipated completion date.**

This project will be ongoing. Steps will continually be made to increase our minority business enterprise vendors.

**Describe how the results of assessments have been used to improve student learning or your department's activities.**

We have been able to increase the campus communities awareness of available minority vendors.

## Strategic Plan Goal

## Unit Goal

**With which 1 or 2 goals from the 8 current strategic plan goals does your 2007-2008 goal best align?**

**Goal for 2007-2008**

5 - State of the Art Infrastructure

Implementation of Employee ACH

**What actions have you taken to achieve this goal?**

Working in conjunction with Human Resources, employee ACH was successfully implemented in April.

**What measures have you taken towards assessment of this goal?**

Employee ACH has been successful and no issues have arisen.

**Describe the progress you have made toward attaining this goal including the anticipated completion date.**

The project is complete and enhancements will be forthcoming.

**Describe how the results of assessments have been used to improve student learning or your department's activities.**

This has resulted in a cost savings for Procurement Services. Checks and remits no longer are printed.

## **Strategic Plan Goal**

## **Unit Goal**

**With which 1 or 2 goals from the 8 current strategic plan goals does your 2007-2008 goal best align?**

**Goal for 2007-2008**

8 - Ongoing Quality Improvement

To increase the usage of the P-Card program.

**What actions have you taken to achieve this goal?**

We have implemented bi-monthly training sessions for both new and existing users. This has increased the users confidence level thus enabling them to increase their p-card usage.

**What measures have you taken towards assessment of this goal?**

We have monthly reports which show p-card usage. Users are given an opportunity to evaluate the training sessions.

**Describe the progress you have made toward attaining this goal including the anticipated completion date.**

Statistically, our p-card usage is continuing to increase. It is up 10% from last year.

**Describe how the results of assessments have been used to improve student learning or your department's activities.**

Feedback from the training sessions has enabled procurement services to make the training more effective.

## **Section C**

### **Program or Service Specific Assessments**

**What program or service specific assessment occurred in the current academic year?**

Procurement Services will gather evaluations to solicit feedback from staff attending training classes for P-Cards, On-line requisitions, Travel, and Procurement procedures.

**How were the results of the assessment used to improve programs or services?**

The majority of the evaluations were very positive. Procurement Services was able to revise instruction manuals to better service the users needs.

## Section D

### Unit Contribution or President's Performance Measures

**Please review the [President's Performance Measures for 2007-2008](#). Did your unit contribute to any specific performance goals for the President?** (If so, please indicate whether the measure set was attained and to what degree.)

II. GOAL: The Student Community

A position has been dedicated to assist student government and student activities with their financial activities.

VIII. GOAL: Ongoing Quality Improvement

Employee ACH was implemented. This project benefits all university employees and realizes a cost savings for the university.

## Part 2

### Section A

### Unit Goals for Coming Year (2008-2009)

## Strategic Plan Goal

## Unit Goal

**With which 1 or 2 goals from the 8 current strategic plan goals does your 2007-2008 goal best align?**

**Goal for 2008-2009**

VIII. GOAL: Ongoing Quality Improvement

Continue increased expansion of the p-card program.

**What action(s) will you undertake to achieve the goal?**

More frequent training sessions will be offered. Audits will be conducted on a timely basis by creation and use of audit schedule.

**By what means will you assess goal achievement?**

Increased use of p-card throughout the University as shown on monthly usage reports.

**How will you know if you have successfully attained each goal?**

Goal will be obtained by increasing our p-card rebate through Bank of America.

**How will the results of the above assessments be used to improve student learning or services?**

Increased use of p-card will lead to greater cost savings for the university, by decreasing costs of paper and postage.

## Strategic Plan Goal

## Unit Goal

**With which 1 or 2 goals from the 8 current strategic plan goals does your 2007-2008 goal best align?**

**Goal for 2008-2009**

V. GOAL: State of the Art Infrastructure

Continued collaboration of the Procurement Task Group with the ESAC Group to review and make recommendations for environmentally sound procurement strategies

**What action(s) will you undertake to achieve the goal?**

Meetings will be held on a quarterly basis to review and make recommendations concerning environmentally sound procurement strategies.

**By what means will you assess goal achievement?**

Continued increase of environmentally sustainable products, as cost allows.

**How will you know if you have successfully attained each goal?**

Goal achievement will be assessed by the quarterly meeting minutes at the task group meetings.

**How will the results of the above assessments be used to improve student learning or services?**

The group will promote awareness of environmental sustainability issues in regards to procurement, such as use of recycled products.

## Strategic Plan Goal

## Unit Goal

**With which 1 or 2 goals from the 8 current strategic plan goals does your 2007-2008 goal best align?**

**Goal for 2008-2009**

V. GOAL: State of the Art Infrastructure

To continue to identify local minority business enterprise vendors and assist them in their goal to do business with Florida Gulf Coast University.

**What action(s) will you undertake to achieve the goal?**

Development of an interactive web based vendor information form.

**By what means will you assess goal achievement?**

Goal achievement will be measured by quarterly MBE reports and in increase in minority vendors in the FGCU vendor database.

**How will you know if you have successfully attained each goal?**

The goals will be deemed successfully reached when the information form has been completed and successfully implemented.

**How will the results of the above assessments be used to improve student learning or services?**

Increase the number of MBE vendors in the FGCU vendor database.

## Section B Resources

**What additional resources have you requested and received a commitment for during 2008-2009 from your area VP or the President that is based on your analysis of assessment data for 2007-2008?**

Full time Accountant position requested to handle the increased audit responsibility that comes with increased p-card usage. Salary: \$31,000, desk space, computer system and telephone will be needed.

Technical assistance in development of the interactive web based vendor information form. Funding for the onsite vendor trade show (promotional giveaways, room rental, etc.)

## Section C

### Assessment Plans

#### What assessments are you planning to conduct during 2008-2009?

Procurement Services will gather evaluations to solicit feedback from staff attending training classes for P-Cards, On-line requisitions, Travel, and Procurement procedures.

Continued analysis of the quarterly MBE vendor/expenditure reports.

## Section D

### Coming Year - Strategic Plan Contributions

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