

SPRING 2019 PROCUREMENT TRAINING SCHEDULE

DATE	TIME	COURSES OFFERED
Monday, March 18	1:00p.m.	Workday Procurement: Tips & Tricks
Monday, March 18	2:30p.m.	Sole Source Procurements
Monday, April 1	9:00a.m.	Specs 101 & Complex Specifications
Monday, April 1	10:30a.m.	Department Solicitaions
Thursday, April 18	1:00p.m.	Strategic Sourcing 101
Thursday, April 18	2:00p.m.	Contract Management
Tuesday, April 30	9:00a.m.	Understanding Risk: Insurance & Indemnification
Tuesday, April 30	10:00a.m.	Moveable Property: From Requisition to Disposal

***All classroom trainings to be held in Peabody Hall Room 225.**

To view classes and register:

- Log in to myLSU
- Click on 'Employee Resources'
- Click on 'LSU Training and Event Registration'
- Locate the appropriate training then click on 'View Classes'
- Click 'Register'
- Email confirmation sent to registrant

ANNOUNCEMENTS

Procurement Services Welcomes New Employees

Nicole Covarrubias, is a graduate of Southeastern Louisiana University with a Bachelor of Science in Supply Chain Management. She is the mother of 2 daughters, ages 12 and 5, and resides in Hammond. She is the newest addition to the Procurement Office handling the printing, catering and promotional items commodities.

Amy Guillot, born and raised in Baton Rouge, has always been a tiger at heart. She worked as a procurement coordinator for a construction firm for 6 years prior to coming to LSU. She keeps very busy as a wife and mother of two. She loves to spend the weekends with family and watching the latest episodes of This Is US and Grey's Anatomy. Amy joins the contract specialist team which handles Professional, Specialty and Consulting Services contracts and amendments.

Michelle McMahan, our new buyer focusing on Software & Subscription Services, graduated from Louisiana State University with a bachelor's degree in Sociology in 2018. She spends most of her leisure time with her boyfriend and fur baby, a German shepherd named Bear. Before working at LSU, she was an assistant manager at her family business, Port Vincent Farm and Home Supply.

Requisition Deadlines Memo

The FY19 Requisition Deadlines Memo has been released and can be found at in the [memos](#) on the procurement website.

Save the Date

The bi-annual Procurement Summit will be held Fall 2019...
More information coming soon!



Across the country purchasing professionals in business, higher education institutions, and state and municipal governments who strive daily to reduce costs, encourage competition, and promote high ethical standards celebrate March as Professional Procurement Month.

Governor John Bel Edwards has issued a proclamation officially [declaring March Professional Procurement Month](#).

Don't forget to thank those individuals entrusted with procurement responsibilities, both within Procurement Services and within the your departments for all their hard work.

*Finance & Administration
Procurement Services &
Property Management*

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UNIVERSITY TERM CONTRACTS

The term contract renewal season is here. 'Term Contracts' are defined as a recurring procurement in which departments can make repeat purchases of goods and services from the same supplier using the same purchase order number in a 12 month period. Also referred to as a standing or blanket order, term contracts are established based on the departments annual need and supplier must hold prices firm during the contract period. These contracts are typically established for a 1 year period with 2 annual renewals as long as the department still has the need for the contract and the supplier agrees to keep the same prices and abide by the terms, conditions and specifications of the original solicitation.



Notices regarding your contract renewal or rebid options are going out daily. If a master contract exists or multiple bids can consolidate, Procurement Services will make the determination on how to proceed. You are reminded to assess the needs of each contract to determine if there is still a need or if quantities should be revised due to an increase or decrease in demand. In addition, if a rebid is required the specifications should be revised to clearly define department's current needs. Quantities should be adjusted to reflect department's buying trends. Revised specifications must be attached to the requisition in a Word document prior to submitting to Procurement Services. Requisitions must be submitted no later than Friday, April 26th.

****Failure to submit requisitions in a timely manner may result in a lapse of services or delivery of goods.***

YEAREND REMINDERS

Purchase Order Close Out

Departments must assess Workday POs and request liquidation of those with unused balances by sending an email to purchase@lsu.edu requesting the PO be liquidated (closed). The email must include the PO number, reason for liquidation and/or written communication (email sufficient) between the supplier and the department confirming the remaining goods will not be shipped/services will not be rendered.*

**This process does not apply to Professional, Specialty and Consulting Services Contracts or Construction. For these POs, contact the PO Buyer-of-Record directly.*

The Mass Close Purchase Order process is currently being run by Procurement on a monthly basis to close (A) non-catalog POs with no encumbrance remaining that have been fully received and fully paid and (B) punch-out POs that are fully paid. The frequency of the Mass Close task will be increased as we approach June 30th.

Departments should review POs with lines that have not been received or invoiced in Workday to determine whether items were received and should have been invoiced.

PO Reports

Departments are encouraged to utilize the following PO reports in Workday to review purchase orders and their encumbrances.

- Find Purchase Order by Program
- Find Purchase Order by Project
- Find Purchase Order by Grant
- Find Purchase Order by Gift
- Find Purchase Order by Funding Source
- Aged Listing of Outstanding Encumbrances

Punch-Out Catalogs Shut Down

Please note the deadlines below that will affect procurement transactions in Workday for the following punch-out catalogs:

- AmeriPrint
- Fisher Scientific
- Medline Industries
- McKesson Corporation
- SHI International
- Steelcase
- United Rentals

DEADLINE	DESCRIPTION
Friday, 6/28/19	Last day departments can create punch-out requisitions & POs for FY19 Last day suppliers can push invoices into Workday
Friday, 6/28/19	Disable punch-outs catalogs (No Reqs/POs or Invoices can be initiated)
Monday, 7/1/19	Reopen punch-outs for requisitions, purchase orders and supplier invoices

The Purchasing Agent Certification program is for professional and administrative staff within the department who are primarily responsible for the regular day-to-day procurement activities, transactions and solicitation of quotes within their department. These individuals have attended the required training courses in order to demonstrate the necessary skills and evaluation methods needed to successfully implement improved purchasing practices as part of the LSU Procurement Services objectives and the mission of LSU.

Requirements for the Purchasing Agent Certification Program

- Applicant should be in department level procurement related role for a minimum of six (6) months.
- Applicant must be recommended for certification by their Dean, Department Head or Director via the submission of the [Certification Request Form](#).
- Applicant is then required to attend all mandatory Procurement Training courses and a minimum of 3 elective courses. Once all classes are taken, applicant must complete and submit the [Purchasing Agent Certification Transcript](#) to Procurement Services at purchase@lsu.edu.
- Applicant must score at least 85% on the 'Purchasing Agent Certification Exam.' Instruction on how to access the test will be sent to individual after transcript is verified. Individual must generate the certificate of completion after passing the test which notifies Procurement of applicant's passing.
- Upon completion of the above requirements, applicant will receive the Delegate Memorandum of Understanding via email to be completed and submitted for approval to finalize delegation. Individual is not officially delegated until the fully executed MOU has been returned to them.
- Delegate must renew certification annually (Jan - Dec) by attending a minimum of 10 training credit hours of classes. Once all classes are taken, delegate must complete and submit a new [Purchasing Agent Certification Transcript](#) to Procurement Services at purchase@lsu.edu.
- Delegate must attend the Procurement Summit and Roundtable meetings to stay abreast of all policy, procedures and process changes.
- Delegate must complete the Conflict of Interest Disclosure for Purchasing Agent Delegates annually certifying that those agents conducting procurement activities on behalf of LSU acknowledge the requirement to disclose any potential conflicts of interest.

REMINDER: Delegation for those individuals that were certified prior to and have not completed the recertification process established in August 2017 will be revoked June 30, 2019.

Policy Updates

Permanent Memorandum 39 (PM 39)

The purpose of this policy is to permit electronic signatures for University business by authorizing the implementation and acceptance of practical and secure methods consistent with the Louisiana Uniform Electronic Transactions Act, La. R.S. 9:2601.

This policy applies to all individuals affiliated with the University, whether paid or unpaid, including but not limited to faculty, staff, students, and associates. This policy permits members of the University community to conduct University transactions electronically and to formally acknowledge their agreement to University internal or external transactions in which they have delegated authority to sign on behalf of the University.

Procurement Services is in the process of coordinating with the President and the Executive Vice President for Finance & Administration and CFO, to maintain a list of those persons with signature authority as delegated by the President or chancellors in adherence with the Bylaws & Regulations of the Board of Supervisors.

Permanent Memorandum 77 (PM 77)

Permanent Memorandum 77 establishes the University's comprehensive procurement policy pertaining to the acquisition of goods and services, including contract administration for LSU entities exercising procurement and contracting autonomy under the Higher Education Procurement Code.

Property Management Policy (POL-U34.307)

This policy applies to LSU A&M, LSU AgCenter, LSU Alexandria, LSU Eunice, LSU Shreveport, and Pennington Biomedical Research Center, which all share a common financial management system, and to individuals who acquire moveable property for the university by any means, i.e. purchased, fabricated and donated. This policy defines and further identifies the recording of University Property.

MASTER CONTRACTS

As a reminder, please visit the [LSU Procurement website](#) for an updated list of [master contract suppliers](#) and the sales representative's contact information.

Amazon Business - Not available in Workday

Amazon Business is to be used as a secondary option when an item is not available through an existing master contract. If an item is available through another master contract supplier, it should not be purchased through Amazon Business.

There were roughly 1,000 users who purchased from Amazon, but only 500ish made up 99% of the Amazon transactions/spend and those 487 end users were sent an invite. The intent is to streamline and consolidate the ordering process through the department business managers rather than having 50-100+ users per department all ordering, but if that setup will not work for your department, we can add additional users.

A new account has been created as an umbrella account for LSU Amazon Business Prime and includes the 2-day shipping and tax exemption. If you previously paid for a Business Prime account, once you deregister and move to the LSU account, the prime account you paid for will be pro-rated and refunded to your LaCarte card.

FAQ # 1: Can I use the LSU Amazon Business account for personal use?

The central LSU Amazon Business Account must be used for business purchases only, in accordance with LSU purchasing policies. The LSU Procurement team will have access to all purchasing history made through the centralized Amazon Business account.

FAQ # 2: I was charged sales tax on my order even though my Amazon Business account is setup for tax exempt purchasing. How do I get refund?

Sales tax may be applied to items purchased from non-Amazon sellers. If your item is sold or fulfilled by Amazon, you can request a tax refund directly from Amazon by calling customer service at (888) 281-3847. If you purchased your item from a 3rd party seller, go directly to Orders, find your order in the list, and click Contact Seller. Please give the seller two business days to respond.

FAQ # 3: How do I contact Amazon Business Customer Service?

Contact [Amazon Business Customer Service](#) or by calling 888.281.3847.

Global Furniture - Not available in Workday

Global Furniture Group was founded with the vision of manufacturing well-made office furniture at affordable prices. Global offers a comprehensive portfolio of solutions that are designed and engineered to meet the changing needs of the Workplace, Education and Health-care markets. Our success over the past half-century owes much to our diverse team, who take pride in creating quality products and providing the highest level of service to our clients.

Howard Technology Solutions - Available in Workday July 1st

Howard Technology Solutions brings to market cutting-edge technology—high quality, reliable, and affordable. From our own Howard manufactured products, such as desktops, notebooks, servers, kiosks, and medical carts to partner products from other leading technology innovators, such as Lenovo, HP, and Microsoft, you can be sure when you buy from Howard that you are getting the most for your technology dollars.

Irwin Seating Co - Not available in Workday

Irwin Seating Company is one of the world's leading manufacturers of audience seating for movie theatres, auditoriums, arenas, performing arts centers, stadiums and places of worship. Our chairs, bleachers and telescopic platforms are installed in thousands of venues all over the world from The Venetian in Macau to Carnegie Hall in New York City, from the Royal Arena in Copenhagen to U.S. Bank Stadium in Minneapolis and thousands of points in between.

OFS Brands - Not available in Workday

OFS is a family owned, community-driven parent company providing socially responsible furniture and logistics solutions in markets across the world. Established in 1937 in Huntingburg, Indiana, OFS has grown into a global leader while staying true to its local roots and core values of sustainability and craftsmanship. For many years, most people knew OFS primarily for wood case goods and excellence in carpentry. While our portfolio has grown and we've added new, more sustainable materials to our designs and production process, wood remains a hallmark of our design heritage. The patterns of grain and color unique to every tree bring an organic warmth and one-of-a-kind beauty.

Home Depot Pro - Available in Workday April 1st

The Home Depot Pro (formerly known as SupplyWorks) is part of the The Home Depot® and the leading national provider of integrated facility maintenance solutions. Over the last decade, they've acquired, created, and developed some of the industry's very best facilities maintenance companies, capabilities, technologies, sales forces, and products. No other maintenance supply company can match our strength in janitorial and cleaning products, as well as our broad assortment of maintenance products for plumbing, electrical, HVAC, and more.

Assets Reminders

- Receipts for tangible equipment should be created in Workday as soon as possible. Workday invoices for tangible equipment cannot be created processed without a receipt. Property Management receives a notification through Workday at the conclusion of the invoicing business process that indicates an asset needs tagging and registration.
- The naming of spend categories for taggable equipment have been modified to assist departments in the selection process. It is important that the correct spend category is used for taggable equipment as it creates unnecessary asset numbers in Workday.

Items with a unit cost of \$999.99 or less are considered to be supplies
 PPE – ‘spend category item’ — \$1,000 to \$4,999.99 per item
 PPE – ‘spend category item’ — \$5,000 or greater per item

- For POs with multiple line items, you should select the most appropriate spend category for each item. Additional supplies, accessories, and/or freight purchased with the taggable equipment should not be also assigned to the “PPE” Spend Category. Shipping/Freight should be assigned to the Freight Services (SC0179) spend category.
- The spend category ‘Equipment Components purchased for Fabrication’ (SC0142) should be used on individual component purchases while fabricating the unit. Upon completion of fabrication, departments must notify Property Management at property@lsu.edu to have the completed fabricated piece of equipment for inventory purposes.

Loaned Equipment

Prior to accepting any loaned equipment, Procurement Services must be contacted to execute a loan agreement. At a minimum, the loan agreement should include the manufacturer and model number of the equipment, the price of the equipment and loan period. This is needed to ensure that the university’s responsibilities to the loaning entity are clearly defined, acceptable, adhered to, and that the equipment is properly insured while located at LSU.

2019 Key Inventory Dates

DATE	DESCRIPTION
February 15	Inventory Scanning Application available; 2019 cycle begins
June 30	Location-based inventory complete.
September 16	Targeted searches <u>and</u> certification by Asset Custodians complete.
October 15	Department Head Certification MUST be complete.

PROCUREMENT ROUNDTABLES

Join our staff for the bi-monthly Procurement Roundtable meetings. It’s a great opportunity to interact with procurement experts and collaborate with other campus departments. Topics for discussion can be submitted using the button on [Procurement homepage](#). Topics should be submitted a week prior to the meeting date to allow time to prepare response and include the necessary individuals/departments to address concerns.

UPCOMING DATES

- MARCH 26, 2019
- MAY 28, 2019
- JULY 30, 2019
- NOVEMBER 26, 2019

***All meetings are held in 225 Peabody Hall from 2:00p.m. - 3:30p.m.**

PROCUREMENT REMINDERS

Procurement Forms

It is recommended that departments visit the Procurement website for the most recent version of all forms as they are often updated without announcement. The attachment of outdated forms delays order/contract processing.

W-9/W-8 Forms

Suppliers must attach a W-9/W-8 that is hand-signed or have an electronically approved signature to an enrollment application for setup in Workday. Also, a revised W-9 is required for individuals needing to change or update their address in Workday. Failure to submit the form may cause delay in processing.

Receipts/Change Orders Access

For Workday access to create receipts on behalf of others or submit change orders, A request for the 'Accountant - Department' role must be made via Security Access in MyLSU (Path: Financial Services>Workday Security Access Request). The role is located in the Accounting—FIN section. No other roles are needed from a department level to conduct Procurement activity.

Requisition Lines

Services requisition lines should only be used for Professional, Specialty & Consulting contracts or Construction/Renovation Project orders. All other items should be entered on a Goods Line.

Business Reviews

Business reviews are scheduled on a regular basis to move from suppliers to partnerships. They include a review of key performance indicators such as: baselines (historical performance), current data, and projected trends for each critical success factor etc. Key successes are shared with the strategic team (LSU & supplier as well as identification of barriers to contract compliance. Working together, the strategic team develops a plan of action to improve performance, increase compliance, and take advantage of savings on spend for goods and services.

Statement of Work/Scope of Services

Developing expectations/criteria for Suppliers through specifications, statement of works and scope of services is critical for the success of any procurement. Defining deliverables (reporting, timelines, requirements, etc) set standards that Suppliers must comply with. Use specific descriptions of project scope requirements and goals. Make sure you spell out any acronyms; the language you use must be precise, so that nothing is misinterpreted after the work begins.

Specifications/Scope of Services

Specifications/Scope of Services must be in a Word document and without password restrictions when submitting to Procurement Services.

Quotes and Contracts

Regardless of if the document requires signature, the terms & conditions on a quote, contract/agreement must be reviewed by Procurement Services before a purchase order is issued or an order placed. Procurement Policies & Procedures visit the Policies & Procedures page to stay current on procurement code policies & procedures.

Procurement Processing Time

The Procurement Services turnaround time for submitted requisitions is 7-10 business days. Purchases requiring competition or have a contract with terms and conditions to negotiate or sign will require additional time. Please plan accordingly.

Spend Categories

Requisition spend categories should reflect the good/service itself, rather than the project/end use of the item. Both the initiator and approvers (Cost Center Manager and Buyers) should all share in the responsibility of taking a second look to ensure the selected spend category accurately identifies the good/service being purchased.

WORKDAY TIPS & TRICKS

Once all items on a PO are fully received in Workday and the invoice is approved, Workday will automatically liquidate the remaining encumbrance for any line that was charged less. All that's left is to close the PO and when I process the next mass close (currently monthly) all POs that are fully received and paid will automatically close.

Ever search for a PO or Supplier and nothing comes up? You should change your search setting to be sure you are always searching all of Workday and not just common areas related to your Workday roles. Below are the steps on how to change search preference settings to search "All of Workday".

- Click on the Cloud
- Click the My Account option
- Select Change Preferences option
- Click on the Preferred Search Category prompt
- Select All of Workday option
- Click Ok button

Departments are reminded that the "Deliver-To" field newly released in the WD32 update is just for information purposes and will not address errors received on requisitions related to the "Ship-To" address. Please continue to select a valid "Ship-To" address in the Default Ship-To Address field.

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