From the Editor - Campus communication, online and otherwise

This month's copy is about the information a College or University Chief Business Officer needs from procurement. The list breaks down into two categories. Obviously, the transactional process information extracted from the data trail and other internal sources on campus is one. As ever, the challenge there is to find a way to measure how well by looking at how many, how long, how much and a host of other measurable bits of data. The other is more basic, as it deals with what the institution should be doing to achieve its central goals. NAEP is seeking to assist with the former by working to develop ways to sort the Big Data that, too often, through sheer volume obfuscates the buried actionable information decision-makers need. The latter is probably best accomplished through a two-way exchange across a desk or conference table rather than via a computerized dashboard display. Procurement officers are members of the campus community and the broader higher education community and have leadership responsibilities extending beyond their departmental job descriptions, as does every other administrative leader on campus and within the industry.

Commentary: What Your Business Officer Wants to Know

By: Neil Markee  
Editor in Chief-Purchasing Link

More than likely, what a Chief Business Officer wants to know is what he or she needs to know to manage the business affairs of the college or university effectively. Much of that can, of course, be gleaned from the institution's database, if there are mechanisms in place to separate the wheat from the chaff, to stick with the metaphor.

Not one of my recent clippings from the NY Times, Wall Street Journal or Chronicle of Higher Education dealt with the details or overall performance of the procurement process generally or on any campus. Maybe that is how it should be. Maybe the same, sober, effective, or even creative expenditure of the institution's resources has become a given because we have the tools, skills, people and will to get the job done effectively. Maybe no news is good news. But maybe isn't good enough and how is a CBO to ensure that is the case on any one campus? That is what the CBO needs to know.

Procurement performance directly influences the ability of the institution and its departments to achieve long, short, and mid-range goals by influencing how effectively limited resources are used. NYC's one-time Mayor Ed Koch was famous for soliciting instant feedback by asking, "How am I doing?" and the same question must at least flit through the minds of buyers, chief procurement officers and CBOs daily as they commit the institution's scarce resources.

I suspect every CBO would like to be able to instantly call up a computerized performance-oriented dashboard display and quickly review overall procurement performance data and then drill down to find whatever level of detail was needed. For many years, Detroit's goal in that regard seemed to have been to provide as little dashboard information as possible and that's all there was. Drilling down was a geologic or engineering term. At another level, you may recall pictures of flight engineers on WWII bombers and early four-engine airliners sitting before and scanning a wall of dimly lit gauges and switches. For them, monitoring and analyzing technical performance data real-time had become a survival-related job. Obviously, the CBO isn't looking for another full-time assignment but he or she would like to have the data available when needed.

During the recent NAEP Annual Meeting I heard many highly detailed, acronym-laden sidebars and cooperative's current and upcoming solicitations. Wise Words

Quote of the Month

RFP Update

- Click here for an update on all of the Cooperative's current and upcoming solicitations.
- AEP Congratulations Don Buffum
- LaDonna Purcell Named to NAEP Board of Directors
- Develop Your Professional Career
- Craft Clear Concise Contracts
- Calendar of Events
- Sustainability on Campus
- Quote of the Month

New at E&I

- High-Quality Library Furniture from AGATI
- Thrifty & Dollar Rent A Car Now Available Through Hertz Contract
- Introducing Jill Sullivan - E&I's New Member Relations Executive
- Maximizing Your Purchasing Power! Did You Know?
effectively has proven to be a challenge requiring professional-level expertise, and there is no universal agreement on a short list of the key dashboard measures of procurement performance. NAEP is participating in that discussion within the Association and with others.

As formidable an undertaking as that alone might seem, the need for information stretches well beyond departmental operational-performance data. Like Lindberg, your CBO needs to be able to focus on what's happening outside the cockpit. The CBO needs more than just process-related information from the members of the probably informal business-services cabinet. I think the needed input falls into two general categories. Clearly, the CBO needs to have ready access to the information needed from all sources to effectively oversee business-related activities on campus and to understand how they might most effectively support institutional goals. But what else does a CBO need to know?

I don't know to what extent the informational priority lists of top-level business managers at public or private institutions is driven by media coverage, but institutional reputation matters academically and financially. Reading through my clipping file for the past several months, it's clear the two biggest issues in terms of barrels of ink expended have been sexual assault on campus and the proper role of big-time athletics within the academic community. The former is compelling a national discussion of justice, fairness, responsibility, liability and empathy and the latter even more basically has launched a rethink of what higher education is all about. We haven't earned very good grades in either area so far. When/if the dust settles, our world may have changed. At the moment, climate change and even financial issues seem to have slipped a space or two down the public priority list. Keeping current can be a challenge.

Decision making at the CBO level would probably benefit from well-considered input from the heads of the reporting departments who have extensive daily contact with many on campus and live within the community. I think the CBO needs to know how to use a cabinet as a source of ideas, a sounding board and as part of an internal communications system. One traditional role of a cabinet in the political world has been to provide a small circle of trusted confidential advisors to those charged with making key decisions. Probably the most important characteristic of effective cabinet-members is sound judgment based on being well informed, as one of their central roles is to evaluate and filter raw data to allow the key decision-making team to receive the actionable information they need. The people involved generally head the most important departments within the government to ensure their department's actions are in concert with the goals and policies established at the cabinet level. These departments are assumed to be best qualified to provide whatever level of specialized information as may be required in their areas. How it all fits together is the central issue. A similar need exists within the business office on campus.

Chief procurement officers are senior administrators with substantial responsibilities and many points of daily personal contact within an institution and the community. I think purchasing professionals should be seen as sources of sound, sober input in other than just procurement areas. Rarely have I heard NAEP members discuss what might be described as the larger issues on campus outside the financial umbrella. True, we are involved in sustainability issues and we do play a role in financial affirmative action. But administrators, including procurement officers, can be qualified to serve on committees focused on issues well outside their business specialty. To be consulted and serve effectively, we need to earn a reputation for reaching out well beyond our specialty and for getting involved. In any case, one way or another, procurement is part of virtually every thing happening on campus.

What's happening on your campus?

From the President

Lisa Deal, C. P. M.
University of Florida
NAEP President 2015-2016

Are you curious? A life-long learner? Why am I asking?

If you possess any of these traits, that may explain why you work in procurement and are successful in your position. When looking for new staff or working to transition an existing compliance-based purchasing unit to one that focuses on adding value, consider looking for something different in the candidates—not just someone with purchasing experience. Too often, we post the same, old, tired, position description that sounds like a gate-keeping number-cruncher who requests quotes and tracks infractions to rules. When you think about it, everyone—not just purchasing folks—knows how to buy stuff, because everyone does. Sure, purchasing professionals have specific knowledge about terms and conditions, but is that what makes us great at our jobs? Is that what meets the growing demands in higher education? According to NAEP's 2014 Innovators Forum Report on Talent Management, we need to recruit folks with the “right attributes…we are looking for people with non-traditional skillsets. They should have a significant degree of curiosity and the capacity and desire to learn.”

A few years ago, while recruiting staff, I had an “aha moment,” when I realized that curiosity was a key
quality for a new hire. Now when hiring, we ask “What was the most interesting project you have worked on—or thing you have purchased, and why was it interesting?” What we have learned is that not everyone gets engaged enough in their work to be able to tell you what was interesting about what they were working on and why. We ask questions about how the candidate has solved problems and the best and worst decisions they ever made. We ask about their future goals and what they expect to learn from the job. The answers to these questions really help identify folks who can think outside the box—who are ready for the challenges of working on a campus with really smart people who have challenging resource constraints and limited time for complex business processes. We’ve learned that looking solely within the buying community for buyers can be a real mistake. We’ve recruited retail and professional sales staff who are interested in changing sides, who come with really specific commodity knowledge. There are campuses fortunate enough to recruit from their own student body. Â If you hire folks with nontraditional purchasing skills, you can teach them the traditional stuff, because buying things makes sense. Finding folks who are curious enough to understand the root cause of an issue—and who dig in to resolve problems over and over again—is how we build procurement organizations that really add value to our campuses.

If that sounds daunting, remember that NAEP has tools to help. In the Members-only portion of the NAEP website, under Resources/White Papers, check out the NAEP 2014 Innovators Forum Report on Talent Management, the Competency Wheel and under Resources/Talent Management, a list of interview questions for new buyers.

Good luck recruiting and, when your position descriptions are updated and are successful in enticing curious life-long learners to join your team, share the position description with the NAEP position-description library.

**Strategic Procurement Institute, August 30-September 2**

**Limited Space...**

NAEP’s Strategic Procurement Institute will explore the leading practices being leveraged today within higher education and among top-flight organizations in healthcare and corporate environments. The Institute, scheduled for August 30 - September 2, 2015 on the campus of the University of Colorado in downtown Denver is filling up very quickly this summer and space is limited.

This intensive, in-depth institute is led by strategic-procurement experts Pathstone Partners. They will guide you through the theory and methodology of the leading strategic procurement practices, as well as their practical applications.

As a participant, you will learn the key enablers and leverage points involved in Strategic Procurement disciplines, such as strategic sourcing, supplier relationship management, and centers of excellence. You’ll also learn a methodology and process to execute Strategic Procurement and gain insights from colleagues and leading practitioners within and outside of higher education. Finally, you’ll take home a framework to assess your organization’s readiness to create value through Strategic Procurement.

Register quickly to secure your place at this popular learning event. Attendees at this institute are eligible for 18.25 credit hours. Don’t delay as registration is limited and will sell out.

**Call for Presentations: 2016 Annual Meeting**

NAEP is seeking individuals interested in sharing their knowledge and expertise with our Members at the 2016 Annual Meeting, scheduled for May 22—25 in San Antonio, Texas.

**Early Submission Contest: Win Free Registration — Deadline July 17**

The call for programs is open between May and August. If you submit a proposal by July 17, 2015 and your session is selected by the Program Committee to be placed on the conference agenda, your name will be entered into a drawing for a complimentary registration to the 2016 Annual Meeting in San Antonio, Texas.

**New Submitter/Presenter Contest — for Two Winners**

To encourage submissions from first-time submitters, if you are a new presenter and your session is selected by the Program Committee to be placed on the conference agenda, your name will be entered into a separate drawing. Two winners will be selected from this group to receive a complimentary registration to the meeting in San Antonio.

**Session Tracks:** for full descriptions and for extensive information on suggested topics and criteria, visit our webpage.

- Analytics
Best Practices in Procurement Contract Management - This track will focus on topics requested from contract review professionals.
- Leadership & Strategic Planning
- Materials Management
- Small Institutions
- Talent Management
- Technology

Not sure about the “what” or the “how” of submitting a presentation proposal? Join us for a complimentary webinar on July 9th led by the several Program Committee members who will provide helpful tips as you develop and submit your presentation idea.

Author Opportunities: Educational Procurement Journal

The NAEP Editorial Board is seeking informative and original articles pertinent to the purchasing industry in higher education for publication in the Educational Procurement Journal. Author guidelines are available on NAEP’s website. Send your ideas or articles to Editorial Board Chair Mike Chmielewski.

In addition to being published in a print edition, the Educational Procurement Journal is also available in an interactive online format for ease and convenience. To view an online copy of the current or previous issues, click here.

Authorship Award Opportunity

Contributing your ideas to your professional community is rewarding in itself, but NAEP offers its own recognition honor with the Professional Perspective Award, which is given annually to the author of the NAEP Journal article judged to be the most informative and useful to readers.

Questions? Contact Shane Boyle, NAEP Membership and Marketing Manager, sboyle@naepnet.org, or 443.543.5540.

Author Opportunities: Purchasing Link

Purchasing Link is the online newsletter published jointly by NAEP and the Educational and Institutional Cooperative Serviced (E&I). Ten issues are published annually. The content includes a Commentary section, featuring articles by Neil Markee (former NAEP CEO) and by our Members, as well as two newsletters: the NAEP Bulletin and the E&I Report. We always welcome Letters to the Editor and, for the Commentary section, your original essays on procurement topics. The articles here are intended to be thought-provoking and sometimes even invite feedback from readers. If you have an idea for such an essay (500 words approximately), please contact Editor-in-Chief Neil Markee.

NAEP Updates Procurement Chapter in NACUBO’s CUBA; Download Your Copy

College and University Business Administration, the NACUBO core reference work for higher education management is currently being updated for their 7th edition. In most cases, purchasing is the second largest expenditure on campus after personnel - so how can chief business officers take a more strategic and collaborative approach to create savings? Especially since the procurement process does not follow a "one-size-fits-all" model. The process is unique for many reasons: The marketplace responds differently to higher education; institutional needs change in response to research or new programs; and higher education competes for faculty, students, and funding.

The updated Procurement chapter is written by Nancy Brooks, Iowa State University and Richard Taylor, University of California Berkeley/San Francisco. You can download a free copy of the 22-page chapter by clicking here.
Keeping Vital Labor Channels Open While Managing Inherent Risks

The proliferation of independent contractors as a labor source presents a serious challenge to colleges, universities and corporations that rely on specialty work from this group of contingent workers. How to sustain this vital labor channel without overpaying and minimizing the risks associated with worker misclassification is a required competency available today through MetaProcure.

Consequences of Worker Misclassification
There are many potential and serious consequences of improperly classifying a worker as an independent contractor. Among them are the financial consequences associated with unpaid employment taxes including back taxes, penalties and interest that can run into millions of dollars. Misclassification also produces the potential for the disqualification of otherwise qualified benefit plans for failure to include eligible workers. And failure to consider workers as employees could lead to violation of multiple state and federal laws covering employees including FLSA and ERISA. If workers are deemed to be employees, employers must have a valid I-9 form completed for them. And workers improperly classified as independent contractors may be eligible for back pay and benefits they have been denied.

A very significant source of classification conflict arises out of worker contact with state unemployment agencies. Misclassification is often detected by these agencies when workers apply for unemployment benefits. If misclassification is occurring, the client faces a good chance the misclassification will be detected.

Leverage Independent Contracts Diagnostics and Contract Restructuring to Mitigate Risk
Independent contractors are an important labor source within many business sectors. MetaProcure keeps those channels wide open while mitigating risks through a dual, common sense approach that leverages independent contractor diagnostics with contract restructuring. Independent Contractor (IC) diagnostics consists of an assessment of the contractor's legal and business standing, as well as of assignment factors established under Nationwide Mutual Ins. Co. v. Darden, and what has now become known as the Darden Common Law Test. MetaProcure applies criteria derived from the client's tolerance for risk to assign the results of each review to a Risk Assessment Matrix. MetaProcure provides contract restructuring options aligned with the results to allow clients to engage the services of these workers while avoiding the risk of misclassification. Common restructuring options include:

- Accept the risk by leaving the existing relationship in place. This option may be deemed viable when an assignment is concluding in the very near future, or when the IC is incorporated, which would greatly mitigate any risk associated with worker misclassification.
- Share the risk by subcontracting for the worker's services through an assigned corporate supplier. This option is practical when the IC is not incorporated, or when he or she does not carry sufficient insurance.
- Avoid the risk by "payrolling" high-risk workers that are deemed to be misclassified as 1099 Independent Contractors. Worker misclassification risk is negligible when the worker is a W2 employee of a trusted staffing provider.

MetaProcure's approach provides other business benefits as well. For instance, The Affordable Care Act mandates that everyone must be insured, and MetaProcure avoids the administration clients experience when a worker goes to an exchange and claims to be the client's "employee". Our approach prevents that situation from occurring. And finally, we can validate through our market data that independent contractors are charging a fair and competitive price for the services they provide, helping to reduce costs as well as mitigate risks.

Summary
Up until now, the use of independent contractors has been a zero-sum game: If they don't qualify, you can't use them. MetaProcure allows its clients to obtain the services of those vital workers under an arrangement that minimizes costs and eliminates the risks and associated consequences of worker misclassification.

Contact Jeff Hebert, Associate Vice President of Workforce Management, with questions about Independent Contractor Management at jhebert@metaprocure.com or (781) 297-9766. Or connect with Jeff on LinkedIn https://www.linkedin.com/in/jchebert1.

About MetaProcure
MetaProcure is changing the way Procurement teams are able to utilize internal talent to optimize innovation, generate collaboration and improve category management. Leveraging industry-leading cloud-based technologies, domain expertise and experienced service partners, MetaProcure provides next generation procurement solutions that produce incremental as well as transformational value. MetaProcure service lines include: Source-to-Pay, Contingent Workforce Management and Tail Spend Management.

Visit www.metaprocure.com for more information.
Participate in an Open Dialogue on Improving Federal Procurement

The Chief Acquisition Officers Council, the Department of Health and Human Services and the General Services Administration are conducting a National Dialogue to explore opportunities for streamlining the procurement and grant processes. The dialogue launched on May 28, 2015, and will close on May 30, 2017.

The open dialogue focuses on three topics (campaigns). Each campaign will focus on a unique aspect of the Federal contracting and grants process, for which your insight and feedback are welcomed.

- Campaign 1—Reporting compliance requirements shared by prime and sub-awardees of Federal procurements and grants.
- Campaign 2—Procurement practices, processes, and reporting.
- Campaign 3—Grants practices and processes.

You are encouraged to join and participate in the national dialogue through the online platform at: www.cao.gov.

WESCO Virtual Campus Tool

Over the last decade, Educational customers have dramatically increased their interest in using cooperative purchasing contracts, to deliver to their schools the best of both worlds scenarios of competitive pressure on suppliers, and speed of acquisition for teachers, students and administrators.

At WESCO, we have created tools to help our sales teams share information on the technical elements of the products we sell, with the procurement professionals often tasked with buying items they are not extremely familiar with. One of these tools, WESCO's Virtual Campus, and is great for the customers that need to quickly educate themselves on available items.

You can access the entire breadth of our product offer, as you tour the various buildings and grounds on a college campus, at www.wesco.com/education.

We have had great feedback on this during discussions with College and University Purchasing experts and department managers at the annual NAEP conference in Atlanta, and expect many more this summer and fall at the NIGP and NPI annual conferences, and the Regional NAEP meetings. Tell us what else you need to make your job easier, using the Contact tab in the link above.

Member News:

- NAEP Congratulates Don Buffum, MSU for Excellence in Government Award
  Don Buffum, director of Procurement &amp; Contracts at NAEP member Mississippi State
University in Starkville, MS was recently recognized by Mississippi Governor Phil Bryant "for dedicated public service with excellence, innovation and integrity in his areas of expertise".

Don received the Excellence in Local and District Government Award on May 27, 2015. Congratulations Don!

Click here to read the full article on the Mississippi State University website.

- **LaDonna Purcell Named to NAEP Board of Directors**
  LaDonna Purcell, Director of Procurement Services at Morehead State University in Kentucky has been named to the NAEP Board of Directors as the District III representative. Her appointment runs through 2017.

**Develop Your Professional Career**

NAEP can help you plan out your next steps in your procurement career. Each phase of your career calls for specific skill sets and job knowledge. By sharing best practice tips and case studies, the NAEP Procurement Academy is designed provide you with the necessary knowledge and tools to succeed in your current position and prepare you for advancement in higher education procurement. No matter where you are in your procurement career, there is a cohort group for you:

**Foundation**: course schedule
If you are newer to higher education procurement, this tier is for you. Join others in your cohort group as you discover best practices across a broad range of procurement topics including the legal aspects of procurement.

**Professional**: course schedule
Ideal for the more seasoned veteran, learn from subject matter experts who will share best practices on leadership development, ethics and diversity, contract development, management and administration, as well as special legal issues in procurement.

**Professional Plus**: course schedule
Are you ready to manage people? Do you understand Emotional Intelligence and conflict resolution? This tier will teach the specific skill sets needed to become an effective leader on your procurement team and at your institution.

All three tiers will begin with a general session on Sunday and close with a banquet on Tuesday evening. In between, break down into your specific cohort group for in-depth classroom training.

Register now to be in Arizona in February.

**Craft Clear Concise Contracts**

Clear contract drafting is a skill that must be learned. The ability to draft procurement-related documents (contracts, policy, procedures, etc.) clearly is essential to lowering risks and increasing compliance. Whether you are an attorney, a contract officer, a purchasing officer, or a business officer, this class will introduce you to the skills needed to draft clear documents, policies, and procedures.

Register today for this institute in Las Vegas this December.

**Calendar of Events**

- **Strategic Procurement Institute**
  August 30 — September 2, 2015
Denver, Colorado

- **Contract Management Institute**
  December 6-8, 2015
  Las Vegas, NV

- **Procurement Academy**
  Foundation | Professional | Professional Plus
  January 31 — February 2, 2016
  Phoenix, AZ

- **RFP Institute**
  February 2-4, 2016
  Phoenix, AZ

- **Federal Procurement Institute**
  February 2-4, 2016
  Phoenix, AZ

- **May 22-25, 2016**
  2016 Annual Meeting
  San Antonio, TX
  Call for papers is now open.

**Regional Meetings**

- **Great Plains**
  September 13-16, 2015
  Overland Park, KS

- **Florida**
  September 16-18, 2015
  Ft. Lauderdale, FL

- **TOAL**
  September 20-23, 2015
  Rogers, AR

- **Kentucky**
  September 27-30, 2015
  Hebron, KY

- **Great Lakes**
  September 30 — October 2, 2015
  Sandusky, OH

- **Michigan**
  September 29-30, 2015
  Rochester, MI

- **TAGM**
  October 5-7, 2015
  Birmingham, AL

- **District VI**
  October 5-8, 2015
  Tempe, AZ

- **Upstate New York**
  October 6-9, 2015
  Syracuse, NY

- **District II**
  October 11-14, 2015
  Chesapeake, VA

- **New England**
  October 25-28, 2015
  Portland, ME

- **Carolinhas**
  November 15-18, 2015
  Asheville, NC

**Sustainability on Campus**
Cornell University Stops Sale of Apparel Linked to Labor Abuse
After an incident killing 1,120 Bangladeshi workers, the university now requires its apparel licensees to abide by the Accord on Fire and Building Safety in Bangladesh, a five-year agreement between apparel companies and Bangladeshi unions that legally binds its signatories to create safe working environments.

Brandeis University Purchase Conflict-Free Computers &amp; Electronic Equipment
The Massachusetts-based university is the 19th institution worldwide to sign on to ensure that the computers and electronic equipment the university buys have no connection to the mining sector of conflict-ridden areas, such as the Democratic Republic of the Congo.

University of Edinburgh Joins Electronics Watch
(U.K.): The University will now encourage electronics suppliers to disclose factory locations so that labor conditions can be monitored by thematic research, factory surveys and investigative reports.

Elon University Registrar Saves Resources by Removing Fax Machine
In an effort to manage staff workload, meet student needs and save resources, the university's Office of the Registrar has implemented a central printing station, switched diploma paper stock to one that is less likely to fade, offers an automated form depository, and has removed its fax machine.

Three Universities Pilot Sustainable Purchasing Program
Emory University, Portland Community College and University of California at Santa Barbara recently signed up to pilot the Sustainable Purchasing Leadership Council's Guidance for Leadership in Sustainable Purchasing v1.0. The Council offers purchasers detailed advice for promoting market innovation and optimizing the environmental, social and economic performance of their supply chains.


Quote of the Month
“Management is doing things right; leadership is doing the right things.”
— Peter F. Drucker, Essential Drucker: Management, the Individual and Society

NAEP Home | Purchasing Link Archives