UNIVERSITY OF South Carolina

HIGHLIGHTS Purchasing Improvement Project

Below are select improvements from the action plan. The full report provides detail and additional actions.

Provide simple tip sheets and checklists, to make it easier for everyone to prep and submit requisitions. Clear guidance will reduce guesswork, save time, and increase the number of ready submissions.

- Create a user-friendly tip sheet that clearly spells out "which procurement method to use when."
- Create a clear checklist for each procurement method showing key steps and required info/documents.
- Update the Purchasing website to add clear explanations, contact info, an easier-to-navigate toolbox, and links to other areas and offices sometimes assumed to be managed by Purchasing.

Make it easier to check the status of a requisition. For many customers of Purchasing, time is of the essence – and knowing the status of a purchase is extremely important.

- Partner with IT to add more notifications to show the status of requisitions (e.g., missing information).
- Communicate how to check the status of a requisition using managed requisitions.
- Ensure that PIs and/or other affected end users are identified in submitted requisitions.
- Add capability for approver and buyer to add comments to the requisition status.

Implement improvements to simplify process, reduce front-end loopbacks, and reduce process time – and begin next-round work to achieve additional improvement. (See next two pages for data.)

- Sole Source: Develop a standard questionnaire with straightforward prompts for all required info.
- Sole Source: If posted to SCBO, use those 5-10 days to write justification and keep the process moving.
- Develop a standard written quotation form for use when seeking quote.
- Conduct deep dives into the processes of additional procurement methods to find more efficiencies.

Keep track of how well we're serving our customers. Doing this consistently over time will show where we're meeting needs and expectations – and where we need further improvement.

- Develop and use a simple scorecard to monitor process time, loopbacks, and other key measures.
- Strengthen Purchasing's customer survey by adding prompts to gauge customer satisfaction.
- Review survey input and process measures with staff each quarter, so all are aware and engaged.

Gain a deeper understanding of our customers' business needs. By expanding our efforts to listen and learn, we will be better able to serve, support, and help our customers be successful.

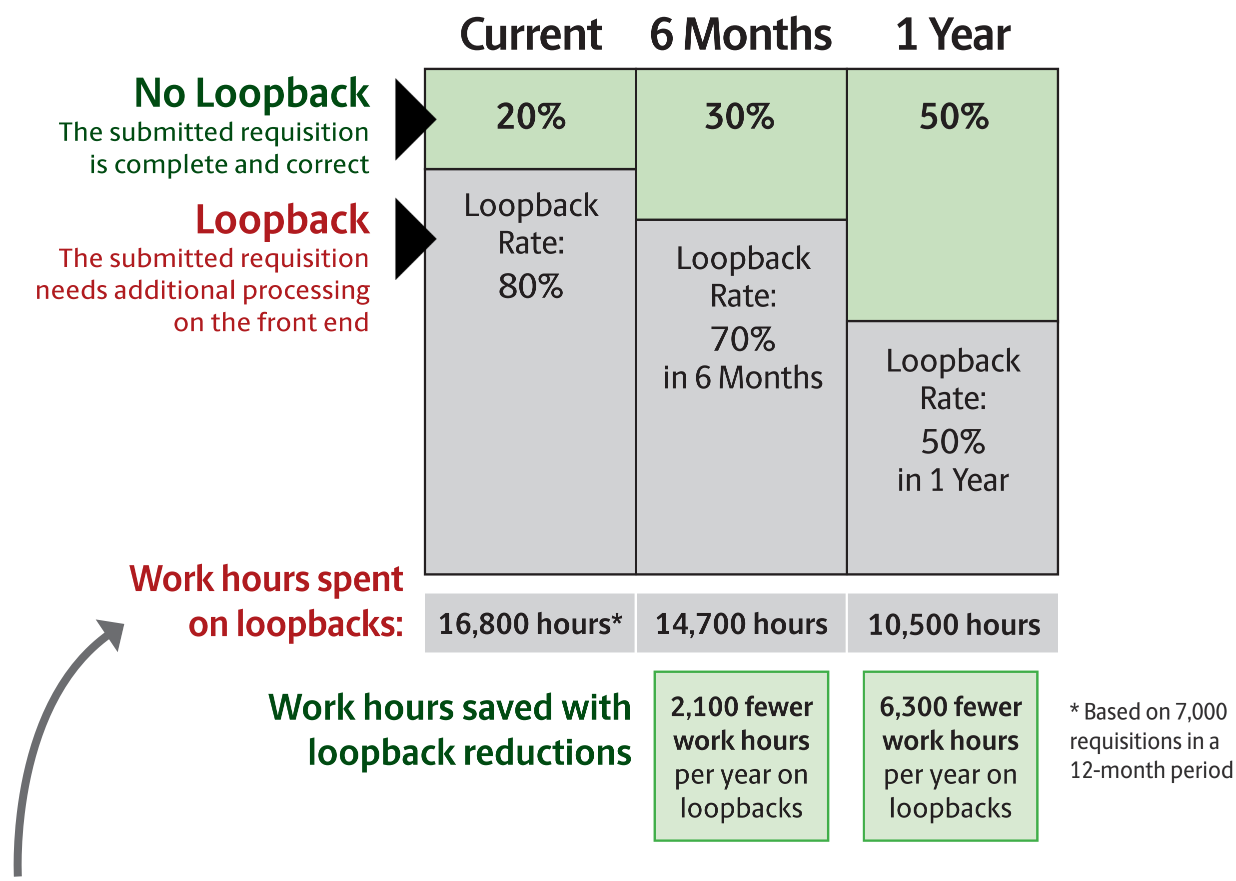
- Expand to have periodic business meetings with more departments to learn about their business needs.
- Meet with principal investigators at least yearly to learn more about their priorities, plans, and needs.
- Meet with system campuses at least yearly to strengthen communication, coordination, and service.

Provide additional opportunities for people to build their purchasing knowledge. Trainings are routinely offered already, but the following actions aim to fill current gaps.

- Include people with different roles in trainings, so all get the same info and a shared understanding.
- Launch an updated Business Manager Certificate Program to strengthen know-how in this key role.

August 8, 2023

A **loopback** occurs when a requisition is submitted with incorrect or missing information, missing documents, or under the wrong procurement method – and Purchasing needs to "loop back." On average, loopbacks currently occur with about 80% of all submitted requisitions. **Improvements by the Purchasing Department aim to reduce this to 50% in a year.**



Loopbacks are time-consuming. A loopback takes 3 work hours on average – for Purchasing to reach back to the requisitioner and/or end user, to gather info, to provide guidance, to change to a different procurement method at times, to update the file, and occasionally to get with the requisitioner again to ensure completion. Based on 7,000 requisitions per year, **reducing loopbacks from 80% to 50% would free up an estimated 6,300 hours for higher value work.**

Loopbacks add significantly to overall process time. The hands-on work by Purchasing totals 3 hours per loopback on average, but this work typically unfolds over a 3-day span – because it involves communication with the requisitioner and/or end user, a variety of activities to be done on their part (such as providing still-needed info, uploading docs, making corrections, possibly changing procurement method, etc.), and occasional back and forth consultation. Based on 7,000 requisitions, **reducing loopbacks from 80% to 50% would eliminate 6,300 days of process time over 12 months.**

Sole Source Process

Baseline

Average = 17 days
From requisition received by Purchasing to purchase order dispatched

- Based on 6-month sample of sole source requisitions
- In the sample, 40% are processed in 10 or fewer days

With no loopback on the front end

Average = 14 days

18% reduction in process time

The process moves 3 days faster on average when there's no need to loop back to the requisitioner and/or end user. This 3-day span includes the time for extra work by all the parties (to supply missing information, to make corrections, to update the file, etc.) plus wait time, which can be magnified by a second loopback if needed.

> $50,000 — **5 days**

> $250,000 — **10 days**

Making productive use of time:

For sole source procurements, public notice must be advertised in South Carolina Business Opportunities for at least 5 business days (contracts greater than $50,000) or 10 business days (greater than $250,000). This obviously stretches out the process time, but going forward, Purchasing buyers will make productive use of this 5- or 10-day span to write the justification, complete other work, and forward it for conflict-of interest review. This will reduce batching, keep the process flowing, and further reduce process time.

Purchasing Improvement Project

This report presents an improvement roadmap developed as part of the Purchasing Improvement Project. Included is a full set of improvement actions aimed at making the purchasing experience more user-friendly and efficient for the Purchasing Department's many customers.

About the Project

The project was chartered by Venis Manigo, Associate Vice President and Chief Procurement Officer, and facilitated by the Office of Organizational Excellence.

The team began with a **discovery phase** to study the current situation. Team members:

- Held 6 listening sessions to gain in-depth input from 16 principal investigators, administrative directors, business managers, IT, and others.
- Conducted a survey, gathering feedback from 161 requisitioners across campus
- Mapped six processes of various procurement methods to uncover occurrences of process waste

This was followed by a **possibility phase** to generate potential improvements, then a **planning phase** to narrow from possibilities to recommended actions.

Members of the Purchasing improvement Team:
Left to right, front row: Clarissa Clark (Director of Purchasing), Candis Golston. Back row: Amy Sabol, Kristen Moss, Edna Sims, Lana Widener, Kim Rose.

About the Improvements

The improvements are organized into the categories shown on the next page, followed by a compilation of improvement actions. Three types of actions are shown:

ONE-TIME ACTIONS Individual improvements and development efforts completed in a set amount of time

START DOING Improvements that call for development work on the front end, then become ongoing

ONGOING Actions that continue over time, reflecting Purchasing's way of doing business

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Team Presentation on August 8

The team presents its project story and action set on Tuesday, August 8, at 11 a.m. to noon. Write to excellence@sc.edu for the Teams link for the live presentation and the link to the session recording.

August 8, 2023

Purchasing Improvement Project

Report Contents:

August 8, 2023

SUMMARY (See pages 4-16 for detail)

Improvement Actions

I. Build Closer Partnerships with Customers

ONE-TIME ACTION	• From input sessions and survey, sort out and forward all comments and suggestions that relate to different areas and offices
START DOING	• Meet with principal investigators at least yearly. • Communicate Purchasing's role more clearly, to increase understanding.
ONGOING	• Expand to have periodic business meetings with more departments. • Meet with the system campuses at least yearly to build partnership, strengthen service, and make distance a non-issue. • Work more closely with other USC divisions and offices whose work intersects with Purchasing and involves the same customers.

II. Improve Transparency and Tracking

ONE-TIME ACTIONS	• Partner with IT to add more notifications to show the status of requisitions. • Add capability for approver and buyer to add comments to the requisition status.
START DOING	• Communicate how to check the status of a requisition using managed requisitions. • Ensure that PIs and/or other affected end users are identified in submitted requisitions.

III. Provide Clearer Guidance Regarding Specific Procurement Methods

ONE-TIME ACTIONS	• Create tip sheet on "which procurement method to use when." • Create user-friendly checklist for each procurement method. • Finalize and post flowcharts of procurement-method processes.

IV. Make the Purchasing Website More Useful and User-Friendly

ONE-TIME ACTIONS	• Update the site to add clear explanations, contact info, and links to other areas and offices sometimes assumed to be managed by Purchasing. • Develop and post a "Frequently Asked Questions" section. • Rework the Purchasing toolbox to ensure all items are current, titled in plain language, and organized to it's easy to find needed guidance right away. • Add online contact form to site
START DOING	• Re-start "Purchasing Highlights" webinar as a user-friendly info source for customers.
ONGOING	• Record live trainings, then post to the website for on-demand availability.

V. Increase Our Commitment to Service

START DOING	• Establish and operate by a set of standards that communicate what customers can expect from Purchasing staff.
ONGOING	• As early as possible in the process, serve as a consultant to the customer, providing guidance as needed to help them submit requisition correctly and with all required info. • Deny submitted requisitions when appropriate, but be judicious and instructive in doing so.

VI. Track Process Performance and Customer Satisfaction

ONE-TIME ACTION	• Strengthen the Purchasing Department's customer survey by adding several prompts to gauge customer satisfaction.
START DOING	• Develop and use a simple scorecard to monitor how well the process is performing. • Each quarter, review the latest customer feedback (from the survey) and process measures with staff, so that everyone is aware of how things are going and where improvement can be made.

VII. Expand Our Internal Expertise

START DOING	• Emphasize training for business managers, with a relaunch and renewed focus on the Business Manager Certificate Program. • Include people with a cross-section of roles in Purchasing-led trainings whenever possible, so that different people get the same information and gain a shared understanding. • Require requisition training before allowing access to the requisition role in PeopleSoft.

VIII. Continue Method-Specific Process Improvement for More Gains

ONE-TIME ACTIONS	• Sole Source: Develop (for requisitioners and end users) a template-sample-questionnaire with guidance on the four descriptive areas required for sole source justification. • Sole Source: Develop (for requisitioners) a standard written quotation form (fillable) for the front-end user/requester to use when seeking quote. • Sole Source: Develop a standard written quotation form (fillable) for the front-end user/requester to use when seeking quote – provide to requisitioners.
START DOING	• Sole Source: During the 5-10 days it's posted to SCBO ($50K or greater), write the justification and complete any other work, and forward it for conflict-of-interest review, to keep process moving.
ONGOING	• Conduct deeper dives into the processes of additional specific procurement methods – to uncover additional method-specific improvements that will simplify and streamline as much as possible, by reducing loopbacks, waits, and other inefficiencies.

I. Build Closer Partnerships with Customers

The input sessions with customers and stakeholders made an impression. Team members noted the value of getting a reality check directly from the source who matters most. They cited the benefit of learning more about the "business" of the various departments – of hearing about the lab and its research, for example, and learning more about another area's seasonality and why that shapes the critical timing of it purchases. Going forward, the plan is to build these kinds of rich interactions into Purchasing's ongoing way of doing business.

ONGOING – EXPAND	Lead: Clarissa Clark	Underway

Expand to have periodic business meetings with more departments.

- **Learn more about their mission, work, and needs**
- **Answer questions and provide guidance**
- **Get earlier notice regarding anticipated purchases**
- **Work together to identify how we can best help**
- **Strengthen the relationship in a sustained way**

- This is currently being done and working well with a number of areas. The plan is to expand.
- Important: With any one unit, the frequency and timing of these meetings would be based on customer preferences and needs, with 2x per year serving as a starting default.
- Sessions would bring together Purchasing leadership, management, and select buyers with key people from the unit – including a mix of "end users" (who are the ultimate customers of Purchasing), business managers, and leaders.
- Year-end sessions could be used to close out any pending procurements and to plan procurements for the upcoming fiscal year.

START DOING	Lead: Clarissa Clark	Start by November 30, 2023

Meet with principal investigators at least yearly – to learn about their purchasing needs and challenges, answer their questions, provide guidance (including on any important changes in procurement), and get earlier notice of emerging priorities and purchases.

- While the partnership meetings (above) will involve various PIs in many cases, it's important to have periodic sessions that focus entirely on this high-priority group of customers – especially given the university's commitment to research.

ONGOING – EXPAND	Lead: Clarissa Clark	Underway

Meet with the system campuses at least yearly to build partnership, strengthen service, and make distance a non-issue. This includes the comprehensive universities (Aiken, Beaufort, Upstate) and the Palmetto College campuses (Lancaster, Salkehatchie, Sumter, Union).

ONGOING – EXPAND	Lead: Clarissa Clark	Underway

Work more closely with other USC divisions and offices whose work intersects with Purchasing and involves the same customers.

- The Purchasing Department and the Controller's Office have already expanded their collaboration.
- Opportunities where closer partnership would be beneficial include the Division of Information Technology, the College of Arts and Sciences, and the Office of Sponsored Awards Management.

START DOING	Lead: Venis Manigo	Start by September 30, 2023

Communicate Purchasing's role more clearly, to increase understanding throughout the university of what the department does and does not do.

- The input sessions revealed misunderstandings of Purchasing's role, with people sometimes assuming that Purchasing has responsibility or authority in areas that are managed elsewhere.

ONE-TIME ACTION	Lead: Andriea Johnson	Complete by August 31, 2023

From the input sessions and survey of requisitioners conducted by the Purchasing improvement team, sort out and forward all comments and suggestions that relate to different areas and offices.

- The prompts in the input sessions and survey were purchasing-focused, but given how different areas and processes are connected, it's no surprise that some of the input addressed other areas (grants management, A/P, travel, etc.).

II. Improve Transparency and Tracking

For many customers of Purchasing, time is of the essence – and knowing the status of a purchase is extremely important. The following actions relate to the tracking function.

START DOING	Lead: Lana Widener	Start by August 15, 2023

Communicate how to check the status of a requisition using managed requisitions.

- This approach offers a good way to check status, but it is not widely known, especially among end users such as PIs.

START DOING	Lead: Lana Widener	Start by August 15, 2023

Ensure that principal investigators and/or other affected end users (and their contact information) are identified in submitted requisitions.

- Minimally, name(s) and contact info should be included in the Comments section.
- Ideally, a field should be added to prompt this.
- This information speeds things up when a buyer needs to contact the PI.

ONE-TIME ACTION	Lead and completion date: TBD

Partner with IT to add more notifications to show the status of requisitions.

- Currently there is only one, to indicate when it has been approved.
- Add an option for a "missing information" notification – and consider others.

ONE-TIME ACTION	Lead: Lana Widener	Underway

Add capability for approver and buyer to add comments to the requisition status.

III. Provide Clearer Guidance Regarding Specific Procurement Methods

Like many functions, purchasing has its own complicated terminology, jargon, and instructions. This is a problem for customers, most of whom are *not* full-time purchasing professionals. With the following action steps, the aim is to put key guidance in plain English for each procurement method. This will make it easier for customers to know what to do and what to provide. Ultimately, it will increase the percentage of incoming requisitions that are complete and correct, which will reduce loopbacks, save time, and quicken the process for everyone.

ONE-TIME ACTION	Lead: Clarissa Clark	Underway

Create a tip sheet on "which procurement method to use when" – keeping it brief and in straightforward language that non-purchasing people can easily understand.

ONE-TIME ACTION	Lead: Candis Golston	Complete by September 15, 2023

Create a user-friendly checklist for each procurement method – spelling out key steps, alerts, and required information and documents.

- These will be easy to follow – presented in brief step-by-step format.
- Development will start with the procurement methods that are most frequently used and have the most incoming errors and missing information.
- The checklists will note items that come up most often as missing, insufficient, or in error – so that requisitioners are more attentive to these key items and more likely to submit complete and accurate requisitions. (For example, items to highlight for sole source include: quote attached, market research has been performed, sole source justification memo, clear written determination.)
- As they're developed, the checklists will be communicated and added to the Purchasing toolbox.
- Checklists will be periodically reviewed and updated as needed, to ensure they are current.

ONE-TIME ACTION	Lead: Clarissa Clark	Complete by October 31, 2023

Finalize and post flowcharts of the various procurement-method processes.

- These will be helpful to customers and to Purchasing staff, especially to new staff members for learning purposes.
- To be done in partnership with the Office of Organizational Excellence.

IV. Make the Purchasing Website More Useful and User-Friendly

The Purchasing website has grown substantially over the years – the site's toolbox currently contains more than 80 available resources and links in 10 sections. The time is right for a thoughtful house-cleaning that leans up certain sections, adds a few new needed items, and ensures that customers can more easily find what they need.

ONE-TIME ACTION	Lead: Amy Sabol	Complete by January 31, 2024

Update the Purchasing website to add clear explanations, contact info, and links to other areas and offices that are sometimes assumed to be managed by purchasing.

- Included are A/P, grants, travel, Sponsored Awards Managements (SAM), etc.

ONE-TIME ACTION	Lead: Aimee Rish	Complete by September 30, 2023

Develop and post a "Frequently Asked Questions" section at the Purchasing website.

ONE-TIME ACTION	Lead: Mac Stiles	Complete by September 30, 2023

Fully review the Purchasing toolbox, making revisions and other changes to ensure that all items are current, titled in plain language, and organized to make it easier for site visitors to find needed guidance right away.

- Start with the Purchasing toolbox, which is the site's biggest single location of resources.

ONE-TIME ACTION	Lead: Mac Stiles	Complete by August 31, 2023

Add an online contact form to the website, to make it easier for people to submit questions.

- With responses to a dropdown menu and/or checkbox prompts, the message could automatically route to an appropriate person within Purchasing.
- This contact form would be in addition to the email address and phone number currently at the site.

ONGOING	Lead: Mac Stiles	Underway

Record live trainings, then post the recordings to the website for on-demand availability.

- Short videos on specific topics can be especially helpful.
- Ensure that videos are well-organized and labeled in the Purchasing Toolbox or on a separate webinar/training web page.

START DOING	Lead: Lana Widener	Start by December 31, 2023

Re-start the quarterly “Purchasing Highlights” webinar, to serve as a user-friendly source of key information to Purchasing customers.

- Feature a prominent listserv signup at the website.
- With the newsletter and all information provided by Purchasing, keep it brief and put it in jargon-free plain language so it’s easy to understand by all.

V. Increase Our Commitment to Service

The opening words at the Purchasing Department website state that "CUSTOMER SERVICE COMES FIRST. Our goal is to develop and maintain an excellent working relationship with university departments, vendors and state procurement."

The following actions are already in practice to a degree, but in spelling them out below, we are affirming our commitment to make these practices an everyday reality with the people we serve.

ONGOING	Lead: Clarissa Clark	Underway

As early as possible in the process, serve as a consultant to the customer, providing guidance when needed to help them submit the requisition correctly and with all required information.

- Begin each purchase with the customer in mind. Focus on the request and what their need is. Ask questions of them on the front end to understand what they're trying to do.
- Have a "how can I help you" approach and a "get to yes" mindset.
- Encourage their questions in order to spot and address knowledge gaps. Listen and coach, providing front-end guidance so that the requisition is submitted correctly the first time around.

DEVELOP AND START DOING	Lead: Venis Manigo	Start by October 31, 2023

Establish and operate by a set of standards that communicate what customers can expect from Purchasing staff.

These standards are designed to keep the process flowing:

- Return all calls, emails, and contact-form inquiries within 48 hours.
- Buyers: Contact PI or other end user within two days of receiving a requisition.
- Begin working on sole source requests the same day they are received whenever possible.
- When identify missing information or errors in a submitted requisition, immediately contact the requisitioner.

ONGOING	Lead: Sourcing Clerks	Underway

Deny submitted requisitions when appropriate, but be judicious and instructive in doing so.

- This approach has been the intended practice. It's included here to underscore its importance.

- A key goal is to maximize the percentage of requisitions that are submitted with all of the required information. With those that are missing information or have incorrect information or an incorrect procurement method, the aim is to be service-oriented and coaching-oriented in response – seeking the needed information and/or corrections, and using this as a learning opportunity so that the person submits correctly the next time
- When a denial is appropriate, it should be communicated soon after the requisition has been submitted, with guidance whenever possible on what to do differently with future submissions of this type.

VI. Track Process Performance and Customer Satisfaction

When it comes to service, it's important to have meaningful measures that provide an objective reality check. That's the purpose of the following actions. They're intended to track service quality, check the impact of improvements and overall progress, and gauge (in a simple way) the health of key processes.

ONE-TIME ACTION	Lead: Kim Rose	Complete by September 30, 2023

Strengthen the Purchasing Department's customer survey by adding several prompts to gauge customer satisfaction.

- These were included in the survey conducted by the Purchasing improvement team:
  - **Responsiveness**: When I send emails or leave messages with the Purchasing Department, they respond promptly.
  - **Understanding**: When I talk with members of the Purchasing Team regarding procurement-related situations, they take time to listen, learn, and understand.
  - **Helpfulness**: When I reach out to the Purchasing Department with problems or questions, they provide useful guidance.
- Add a prompt to gather feedback on what the Purchasing Department does very well, along with examples of standout service from Purchasing staff.

DEVELOP AND START DOING	Lead: Lana Widener	Start by October 31, 2023

Develop and use a simple scorecard to monitor how well the process is performing.

- Adopting a scorecard takes time, so a recommended first step is to track these measures for just one or two procurement methods.
- Several meaningful measures are key:
  - **Loopbacks**: The percentage of times a buyer needs to "loop back" to a requisitioner due to a requisition, missing information and/or attachment, or requiring corrections.
  - **Why these loopbacks are occurring**: Checksheet-type tracking can be used on a sample basis to determine the main reasons why a buyer had to loop back to the requisitioner. When the most-frequent reasons are known, it's easier to direct preventive steps to reduce these reasons and the resulting loopbacks.
  - **Process time**: Start-to-finish process time, from the arrival of an approved requisition to dispatch of the purchase order (measured in days).

- The health of a process can be seen by comparing measures across time periods. The aim is to reduce loopback and reduce process time.
- The Office of Organizational Excellence will be available to assist with scorecard development.

START DOING	Lead: Clarissa Clark	Start by December 31, 2023

Each quarter, review the latest customer feedback (from the survey) and process measures with staff, so that everyone is aware of how things are going and where improvement can be made.

VII. Expand Our Internal Expertise

Purchasing provides regular trainings. The following actions aim to make this good situation even better, to ensure that people have the purchasing knowledge they need to succeed.

START DOING	Lead: Clarissa Clark	Underway

Emphasize training for business managers, with a relaunch and renewed focus on the Business Manager Certificate Program.

- Use this program to underscore the importance of this role while providing comprehensive training on all methods of procurement, policies, P-Card, minority participation, etc.
- Training will be essential for beginners and beneficial for veteran users, because the role of business manager has changed and much has been revised since the training was last offered.
- Team up with the Office of Professional Development and Joanne Callahan of the Controller's Office.
- Up to 30 participants in person, but look at options for making it virtual as well.
- Webinars and other materials will be posted at the Purchasing website for on-demand access to all.

START DOING	Lead: Clarissa Clark	Underway

Include people with a cross-section of roles in Purchasing-led trainings whenever possible, so that different people get the same information and gain a shared understanding.

- For example, invite PIs and requisitioners and business managers to the same session.
- Put emphasis on including business managers. They are in a unique position to serve as connectors – to the PIs and requisitioners in their own departments, and to the Purchasing Department.

START DOING	Lead: Clarissa Clark	Start by January 31, 2024

Require requisition training before allowing access to the requisition role in PeopleSoft.

VIII. Continue Method-Specific Process Improvement for More Gains

Because procurement involves numerous processes, the work of simplifying and streamlining calls for sustained effort – rather than a one-and-done project. That's why it's so important to continue with additional deep dives into the processes of specific procurement methods.

ONGOING	Lead: Clarissa Clark	Start once changes are implemented.

Conduct deeper dives into the processes of a number of procurement methods – to uncover method-specific improvement to reduce loopbacks, waits, and other inefficiencies.

- While the team created process maps of seven procurement methods, one of these (the sole source procurement process) was the focus of closer study. This uncovered additional insights and process-specific improvements.
- Team members now have process-mapping skills and a knowledge of the different forms of process waste, so they are equipped to facilitate this next-stage work with colleagues.
- The Office of Organizational Excellence will continue to provide guidance.

More about the process for sole source purchases:

A number of commenters (input sessions and survey) cited the sole source procurement process as a source of frustration. For some, it's confusing at the front end. Others cite delays and other issues.

The team created process maps of seven procurement methods. Further study on the sole source procurement process uncovered deeper insights and process-specific improvements (further below).

One common source of delay occurs early in the process, when incoming requisitions arrive with incorrect information or missing information or missing documents – and buyers then have to loop back to requisitioners to get what they need, to seek corrections, or to ask questions for clarification. These "loopbacks" occurs with as many as 90% of the incoming sole source requisitions, and with about a third of these, buyers need to go back to the requisitioner a second time. All of this adds up, causing delays and stretching out the start-to-finish process time.

Some of the above action ideas aim to "mistake proof" the process on the front end – that is, to increase the percentage of requisitions that come in with all information complete and correct. Other action steps guard against batching and aim to keep the requisitions flowing through the process.

Sole Source	ONE-TIME ACTION	Lead: Candis Golston	Complete by September 30, 2023

Develop a template/sample/questionnaire with guidance on the four descriptive areas required for sole source justification – provide to requisitioners and end users.

- A standardized template will add clarity and understanding (and reduce errors and required loopbacks) on the front end of the process, relating to submission of input on four key areas:
  - Description of the agency need that this procurement meets
  - Description of market research the agency performed to determine the availability of products or services that would meet the agency's needs
  - Description of supplies, construction, information technology, and/or services the vendor will provide under the contract and justification of need
  - Detailed explanation why no other vendor's supplies, construction, information technology, and/or services will meet the needs of the agency.

Sole Source	**ONE-TIME ACTION**	Lead: Candis Golston	Complete by September 30, 2023

Develop a standard written quotation form (fillable) for the front-end user/requester to use when seeking quote – provide to requisitioners.

Sole Source	**START DOING**	Lead: Candis Golston	Underway

During the 5-10 days it's posted to SCBO ($50K or greater), write the justification and complete any other work, and forward it for conflict-of-interest review, to keep the process moving.

- This avoids batching and delays while maintaining flow, and it ensures that the buyer works on the requisition while it's fresh in their mind.
- Vendor "protests" are infrequent, so most requisitions would continue to flow through. Testing

Appendix A: Input Sessions

The following people provided input in a series of six input sessions hosted by the Purchasing improvement team.

- Dr. Lumi Bakos, Associate Vice President for Research Operations, Adjunct Assistant Professor
- Dr. Donna Chen, Department of Chemistry and Biochemistry
- Jason Cone, Director, Facilities Administration and Finance
- Dr. Roger Dougal, College of Engineering and Computing
- Laurel Eddins, DoIT Strategic Services Program Manager DoIT Strategic Services Program Manager
- Alison Leach Hughes, Director, New Student Orientation
- Dr. Rongying Jin, Department of Physics and Astronomy
- Patricia King, Associate Director of Undergraduate Admissions
- Susan Klie, Director of Budget Operations, College of Arts and Sciences
- Bridget Leslie, Director, DoIT Business Office
- Dr. Adel Nasiri, College of Engineering and Computing
- Dr. Fabienne Poulain, Department of Biological Sciences
- Christian Price, Director of Instructional and Information Technology, College of Pharmacy

  At the time of the input session, Christian was serving as Chair of unITe – a collaborative effort comprised of a broad cross-section of USC senior academic and administrative IT Directors
- Prischilla Ramsey, Assistant Dean for Finance and Administration, College of Pharmacy
- Robert Wilson, DoIT Director of Security Operations and Incident Response
- Kathy Wuchenich, Executive Assistant and Business Manager, Communications and Marketing

Alphabetical by last name

Appendix B: Additional Improvement Opportunities

The Purchasing team identified additional improvement opportunities. Further discussion is needed. The second and third opportunities in particular would need to involve people from other areas.

- **Review all of the P-Card input from the input sessions and survey, to identify opportunities for communication, training, and improvement.**
  - P-Card was beyond the scope of this project, but it came up frequently in the input sessions.
  - One idea that surfaced: Provide special training on P-Card with a larger group that includes PIs.

- **Examine steps in the process involving hard-copy documents to Legal, and explore options to streamline with electronic documents and electronic signature.**

- **Examine additional steps with IT and where these steps occur in the process – to consider whether these should be completed before a solicitation is advertised.**