

Columbia Chapter General Meeting

DATE & TIME:

December 3, 2020 11:30am-1:00pm

LOCATION:

Join Zoom meeting via link below (or use meeting ID 916 0649 5478) https://portlandcc.zoom.us/j/91606495478

- 11:30 Welcome and Introductions Elvis
- 11:35 Chapter Announcements / Reminders
 - Elections results Elvis
 - Membership Committees and Volunteers Elvis
 - Scholarship reminder Christy
 - Pro-D Updates Kathi
 - Virtual Holiday Happy Hour at 5pm on December 17th Tessa
 - Membership updates & renewal reminder Emmanuel
 - Reverse Vendor Trade Show Anthony
 - Manager of the Year/Buyer of the Year call for nominations Anthony
 - 2021 Columbia Chapter budget Anthony
 - Columbia Chapter Handbook revisions Gina
- 11:50 Installation of new Officers/Directors –Brian Smith, NIGP Chapter Ambassador
- 12:00 How Unlikely Partners Can Make You Successful: The realized value in a collaborative Buyer & Supplier relationship and why it matters David Wetzel (see attached bio)

Addressing realized value in collaborative Buyer/Supplier relationships and why they matter. How can you utilize your strategic partners to bring private sector solutions to your public agency and improve your overall value to the agency while staying in regulatory compliance? How do you effectively measure contractor/vendor performance, justify overall savings or share risk management within product or services procurements? There's overall value to an agency when procurement, departments and vendors communicate to implement mutually beneficial solutions and you are the key.

1:00 Adjourn – Elvis Carter

Cost for non-members to attend is \$25. One time guests welcome at no charge.

Next Meetings:

Virtual Holiday Happy Hour – December 17, 2020 5pm Columbia Chapter General Meeting - February 4, 2021

Dave Wetzel Biography



Dave leads U.S. government and education sales for Canon Solutions America, Canon's U.S.-based division.

He brings experience and expertise from working with public sector procurement officials over a 25-year career, with leadership roles at Canon, Office Depot, and Costco Wholesale.

Dave has held an active position on NIGP's National Business Council since 2010 and coauthored several of NIGP's White Papers - focused on the intricacies of buying and selling in the public arena. Dave's roles have included Vice-Chair of NIGP's Business Council and a history of working with national and local leadership at NAEP, ASBO, NIGP, NASPO and NPI.

While advocating for advancement in public procurement, Dave has developed a deep engagement with cooperative contracting and best value procurement, an extensive knowledge of environmental sustainability, and a progressive vision of supplier evaluation and management.

Dave holds an MBA in Management Sciences from the University of Portland and Bachelor of Science degree in Business Administration from California State University, East Bay.





NIGP Business Council: Who We Are





















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The NIGP Business Council Mission...

Serve the NIGP membership and procurement profession through the sharing of resources and expertise in support of NIGP's educational, research and advocacy mission.



Overview: The realized value in a collaborative Buyer & Supplier relationship and why it matters.

Use your strategic partners to:

- bring supplier solutions to your public agency
- reinforce Procurement's overall contribution to the agency
- maintain regulatory and contract compliance

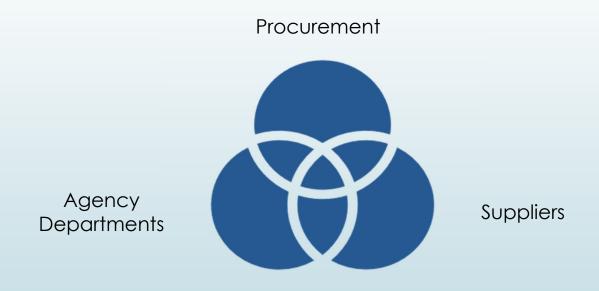
Agenda

- Value in Communicating
- Benefits for Procurement Practitioners
- Performance Measurement

Value in Communicating



Providing value when agency departments, procurement, and suppliers communicate to implement mutually beneficial solutions, and you are the key.



Evolution of the RelationshipA Historical Perspective

Example: eProcurement

31%

Procurement professionals do not have a portal or eProcurement system where they can post bids, RFPs, or existing contract information online.

Source: https://www.govtech.com/cdg/

Benefits for Procurement Practitioners



Benefits & Rewards

A. Mitigating Risk

- i. Risk in fostering relationships
- ii. Risk within contract terms and conditions

Benefits & Rewards

B. Value

- i. Balance of Cost Savings with Best Value
- ii. Industry Expertise
- iii. Suppliers as a Reliable Resource

Example Questions

- Do suppliers have recent customer satisfaction scores from organizations with a similar size, scope of work, and service agreement?
- What current and similar size references does the supplier have that aligns with the intended scope?
- What other relevant, value-added services do the suppliers provide their customers as part of their total value offering?
- Are suppliers' support models specialized to serve public sector entities?
- What training do suppliers have in place for their extended team that supports public sector entities?



Supplier & Contractor Performance Reviews





Buyer/Supplier – Manufacturer



Buyer/Supplier – Distributor



Buyer/Supplier - Service

Challenges on Both Sides

Supplier Rating Spectrum

SUPPLIER

Supplier

- Supplies goods or services
- Basic Supplier duties
- Minor relationship
- Transaction-based
- Price oriented

TACTICAL SUPPLIER

Tactical Supplier

- · Competitive pricing
- · Efficiency processes
- Produces cost benefits & reporting
- No contract in place but earning orders
- No program goals established
- No business reviews

CONTRACT SUPPLIER

Contract Supplier

- Approved Contract Holder (Own or Co-Op)
- Builds relationship with key Purchasing Professionals
- Listed on procurement site
- Works toward defined goals
- Conducts regular reviews and planning sessions
- Contract compliant
- Satisfactory Service

PREFERRED SUPPLIER

Preferred Supplier

- Long-term contract/agreement
- · Endorsed by the University
- · Takes action to direct spend
- Provides impactful reporting
- Considered an asset/resource
- Works with the University to implement new solutions
- Contract Compliance Steward
- High-Quality Service

STRATEGIC PARTNER

Strategic Partner

- Aligned with university initiatives
- Relationship invested & engaged
- Opportunity for broad impact
- Delivers value beyond price
- Included in long-term strategic planning
- Benchmark for supplier performance

Strategic Partners



- (Long-Term Contract or Agreement)
- Aligned with (my organization's) Initiatives
- Relationship Invested & Engaged
- Opportunity for Broad Impact
- Delivers Value Beyond Price
- Included in Long-term Strategic Planning
- Benchmark for Supplier Performance

Required Skill Sets

Measurements

Reporting Tools



Objective Scoring Metrics



Subjective Metrics

Example: Supplier Performance Scorecard State of Oregon

- Procurement Transformation Program includes all services for full eProcurement implementation under four headings
 - Strategic Sourcing, Catalog Management, Supplier Enablement and Marketing Services
- Comprehensive Program to support full Procurement Transformation
- Supplier Ratings based on Performance Based Metrics
- Monthly Supplier/Client meetings to discuss status and performance
- Annual comprehensive program review and program strategy session

Example: Supplier Performance Scorecard - **LSU**



SUPPLIER PERFORMANCE SCORECARD

Supplier				Total Poir	nts Earned	Overall S	core	
Supplier Contact(s)								
Scorecard Timeframe LSU Contact(s)								
Date of Review								
			1				_	_
Account Management	Weight 30%	<u>A</u> (95%)	<u>B</u> (85%)	<u>C</u> (75%)	<u>D</u> (65%)	<u>F</u> (55%)	N/A	56
Supplier representatives address University concerns/issues	6%	Within Hours	Same Day	Two Days	Three Days	Has to be Chased	ns/a	-
appropriately and in a timely manner?	676		Same Day				nyx	⊢
Supplier understands University's requirements? (i.e. Specifications)	5%	Very Knowledgesble	Knowledgeable	Somewhat Knowledgeable	Rarely Knowledgeable	Not Knowledgesble	16/4	1
Supplier representatives meet the University's	5%	Always Meets/Exceeds	Usually Meets	Somewhat Meets	Rarely Meets	Never Meets	16/0	T
service/support.commitments? Supplier representatives are knowledgeable on	270	Commitments Very	Commitments	Commitments Somewhat	Commitments Rarely	Commitments Not	1911	⊢
products/services?	4%	Knowledgesbie	Knowledgeable	Knowledgeable	Knowledgeable	Knowledgesble	76/A	L
How quickly does Supplier's representative return quotes/proposals?	4%	Within Hours	Same Day	Two Days	Three Days	Has to be Chased	16/A	
Supplier encourages & promotes products/services	3%	Always	Usually	Occasionally Encourages or Promotes	Rarely	Never	N6/A	Г
produced by a diverse supplier (WBE, MBE, Veteran, etc.)? Supplier provides information & training's on "best in class"		Encourages or Promotes Always	Encourages or Promotes Usually	Occasionally	Encourages or Promotes Rarely	Encourages or Promotes Never		⊢
practices from industry experts?	3%	Provides	Provides	Provides	Provides	Provides	N6/A	┖
				Total !	% Supplier Earned in "A	ccount Management" C	ategory:	0.
Delivery, Packaging, and Quality	Weight	<u>A</u>	<u>B</u>	<u>c</u>	<u>D</u>	<u>F</u>	N/A	У
	15%	(95%) Always Meets/Exceeds	(85%) Usually Meets	(75%) Somewhat Meets	(65%) Rarely Meets	(55%) Never Meets		5
Products and/or services meet expectations? Supplier's On Time Delivery (OTD) performance for the	4%	Expectations	Expectations	Expectations	Expectations	Expectations	16/A	╙
term of the contract:	4%	100%	99 - 95%	94-90%	89 - 85%	< 84%	N/A	L
Percentage of orders that ship immediately and do not become backordered:	3%	100%	95%	90%	85%	< 80%	76/A	L
Receives legible, detailed, and correct delivery documentation with shipments?	2%	Always Receive	Usually Receive	Occasionally Receive	Rarely Receive	Never Receive	16/A	
Does Supplier ensure products are packaged and shipped	2%	Never	Ravely	Occasionally	Often	Always	16/A	Г
to protect against damage upon delivery?		Damaged	Damaged	Domaged Total % Supplier	Domaged Earned in "Delivery, Pa	Damaged ckaging, and Quality" C	ategory:	0.
				_				
Financial / Contracting	Weight 35%	<u>A</u> (95%)	<u>B</u> (85%)	<u>C</u> (75%)	<u>D</u> (65%)	<u>F</u> (55%)	N/A	Se
Supplier's pricing relative to competitors	10%	Very Mach Below Average	Below Average	Average	Above Average	Very Much Above Average	ni/A	
Supplier's quotes are firm and all inclusive? (i.e. delivery charges, installation)	5%	Ahvays Correct	Usually Correct	Occasionally Correct	Rovely Correct	Never Correct	ng/A	Г
How long are quotations/proposals valid?	3%	60+ Days	31 - 59 Days	30 Days	14 - 29 Days	< 13 Days	ni/A	H
Reports are prepared in a timely manner as requested:	5%	Within Hours	Same Day	Two Days	Three Days	Has to be Chased	76/A	T
quarterly, annually, or upon request								⊢
Immines are accurate and timely	760	Always Accurate	Usvally Accurate	Somewhat Accurate	Rarely Accurate	Never Acouste	41/4	1
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LSU Acct Mgmt



Account Management	Weight 30%
Supplier representatives address University concerns/issues	6%
appropriately and in a timely manner?	0 70
Supplier understands University's requirements?	5%
(i.e. Specifications)	370
Supplier representatives meet the University's	5%
service/support commitments?	370
Supplier representatives are knowledgeable on	4%
products/services?	4%

Account Management	Weight 30%	<u>A</u> (95%)	<u>B</u> (85%)	<u>C</u> (75%)	<u>D</u> (65%)	<u>F</u> (55%)	N/A	Your Score
Supplier representatives address University concerns/issues appropriately and in a timely manner?	6%	Within Hours	Same Day	Two Days	Three Days	Has to be Chased	N/A	
Supplier understands University's requirements? (i.e. Specifications)	5%	Very Knowledgeable	Knowledgeable	Somewhat Knowledgeable	Rarely Knowledgeable	Not Knowledgeable	N/A	
Supplier representatives meet the University's service/support commitments?	5%	Always Meets/Exceeds Commitments	Usually Meets Commitments	Somewhat Meets Commitments	Rarely Meets Commitments	Never Meets Commitments	N/A	
Supplier representatives are knowledgeable on products/services?	4%	Very Knowledgeable	Knowledgeable	Somewhat Knowledgeable	Rarely Knowledgeable	Not Knowledgeable	N/A	
How quickly does supplier's representative return quotes/proposals?	4%	Within Hours	Same Day	Two Days	Three Days	Has to be Chased	N/A	
Supplier encourages & promotes products/services produced by a diverse supplier (WBE, MBE, Veteran, etc.)?	3%	Always Encourages or Promotes	Usually Encourages or Promotes	Occasionally Encourages or Promotes	Rarely Encourages or Promotes	Never Encourages or Promotes	N/A	
Supplier provides information & training's on "best in class" practices from industry experts?	3%	Always Provides	Usually Provides	Occasionally Provides	Rarely Provides	Never Provides	N/A	
Total % Supplier Earned in "Account Management" Category: 0.00%								

LSU Financial / Contracting

Financial / Contracting					
Supplier's pricing relative to competitors	10%				
Supplier's quotes are firm and all inclusive? (i.e. delivery charges, installation)	5%				

Financial / Contracting	Weight 35%	<u>A</u> (95%)	<u>B</u> (85%)	<u>C</u> (75%)	<u>D</u> (65%)	<u>F</u> (55%)	N/A	Your Score		
Supplier's pricing relative to competitors	10%	Very Much Below Average	Below Average	Average	Above Average	Very Much Above Average	N/A			
Supplier's quotes are firm and all inclusive? (i.e. delivery charges, installation)	5%	Always Correct	Usually Correct	Occasionally Correct	Rarely Correct	Never Correct	N/A			
How long are quotations/proposals valid?	3%	60+ Days	31 - 59 Days	30 Days	14 - 29 Days	< 13 Days	N/A			
Reports are prepared in a timely manner as requested: quarterly, annually, or upon request	5%	Within Hours	Same Day	Two Days	Three Days	Has to be Chased	N/A			
Invoices are accurate and timely	2%	Always Accurate & Timely	Usually Accurate & Timely	Somewhat Accurate & Timely	Rarely Accurate & Timely	Never Accurate & Timely	N/A			
Are additional terms & conditions submitted and have to be negotiated?	3%	Never Receive	Rarely Receive	Occasionally Receive	Usually Receive	Always Receive	N/A			
How willing is Supplier to complete our forms/negotiate with LSU?	3%	Very Willing	Willing	Occasionally Willing	Rarely Willing	Never Willing	N/A			
How quickly does Supplier return supporting documentation?	2%	Within Hours	Same Day	Two Days	Three Days	Has to be Chased	N/A			
Does Supplier offer discounts for early/prompt payment?	1%	4% + Discount	3% Discount	2% Discount	1% Discount	No Discount	N/A			
Does Supplier offer rebates for annual spend?	1%	3% + Rebate	2% Rebate	1% Rebate	0.5% Rebate	No Rebate	N/A			
	Total % Supplier Earned in "Financial" Category: 0.00%									

LSU Delivery, Packaging, & Quality / Relationship

		•						
.1					h the supplier	(as a company)		7%
Delivery, Packaging, and Quality	Weight 15%		is:					7 70
	15%	(95%)						
Products and/or services meet expectations?	4%	Always Meets/Exceeds	ays Meets/Exceeds					C01
Products and/or services meet expectations:	470	Expectations	We would renew contract(s) with supplier:					6%
Supplier's On Time Delivery (OTD) performance for the								
term of the contract:	4%	100%	33 33/0	5, 50,,,		101/0	,	
Percentage of orders that ship immediately and do not	20/		25%	000/	050/	- 200/	41/4	
become backordered:	3%		95%	90%	85%	< 80%	N/A	
Receives legible, detailed, and correct delivery	20/			0	0			
documentation with shipments?	2%	ways Receive	Usually Receive	Occasionally Receive	Rarely Receive	Never Receive	N/A	
Does Supplier ensure products are packaged and shipped	20/	Never	Rarely	Occasionally	Often	Always	**/*	
to protect against damage upon delivery?	2%	Damaged	Damaged	Damaged	Damaged	Damaged	N/A	
Table 6 mails 5 mad in 10 alicens and Confirm and Confirm Confirm							0.000/	

Relationship

Relationship	Weight 20%	<u>A</u> (95%)	<u>B</u> (85%)	<u>C</u> (75%)	<u>D</u> (65%)	<u>F</u> (55%)	N/A	Your Score
The working relationship with supplier representative(s) is:	7%	Strong	Good	Average	Poor	No Working Relationship	N/A	
Overall, the relationship with the supplier (as a company) is:	7%	Excellent	Above Average	Average	Below Average	Very Poor	N/A	
We would renew contract(s) with supplier:	6%	Yes, Absolutely	Probably, Revise Pricing	Possibly, Needs Improvement	Potentially, Needs Major Overhaul	No, Prefer to Re-Bid / Find a New Supplier	N/A	
Total % Supplier Farned in "Relationship" Category: 0.00%								

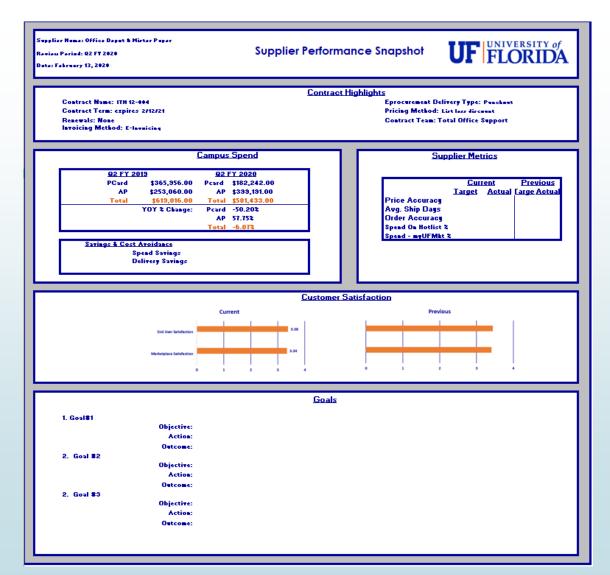
Additional Comments/Recommendations						

Score	Weighting	Overall Grade	
95%	Α	90 - 100%	Α
85%	В	80 - 89%	В
75%	С	70 - 79%	С
65%	D	60 - 69%	D
55%	F	0 - 59%	F

The working relationship with supplier representative(s) is:

Weight

Example: Supplier Performance Scorecard – **UF**



UF Supplier Performance Snapshot

Supplier Name: Office Depot & Mister Paper

Review Period: Q2 FY 2020 Date: February 13, 2020 **Supplier Performance Snapshot**



UF Contract Highlights

Contract Highlights

Contract Name: ITN 12-004 Contract Term: expires 2/12/21

Renewals: None

Invoicing Method: E-Invoicing

Eprocurement Delivery Type: Punchout

Pricing Method: List less discount

Contract Team: Total Office Support

UF Campus Spend

Campus Spend

Q2 FY 2019

PCard \$365,956.00 Pcard \$182,242.00

AP \$253,060.00 AP \$399,191.00

Total \$619,016.00 Total \$581,433.00

YOY % Change: Pcard -50.20%

AP 57.75%

Total -6.07%

Spend Savings
Delivery Savings

UF Supplier Metrics

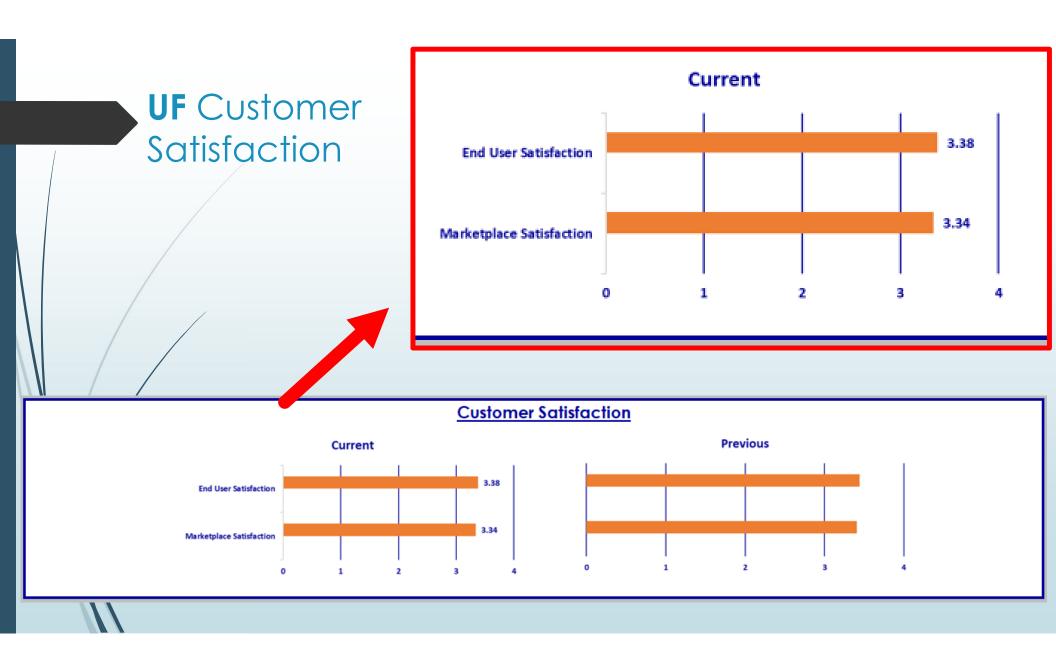
Supplier Metrics

Current Previous

Target Actual Target Actual

Price Accuracy
Avg. Ship Days
Order Accuracy
Spend On Hotlist %

Spend - myUFMkt %



Open Discussion

Resources

Business Council White Papers / Presentations

- 2013 We No Bid And We Will Tell You Why
- 2014 Everybody Wins
- 2015 Healthy Agency Supplier Relationships
- ► 2016 Total Cost of Ownership
- 2017 The Supplier Practitioner Connection Adding Value to Procurement
- 2018 The Procurement Supplier End User Relationship
- 2019 Market Volatility
- 2020 How Unlikely Partners Can Make You Successful

Visit: https://www.nigp.org/home/find-procurement-resources/guidance/papers

2013 - We No Bid And I'll Tell You Why

- NIGP Business Council's Evolving Intentions
- Bid Expectations and Competition Old School vs. New
- NBC Common Solicitation Challenges
- Board Members' Validation of Opposing Challenges
- Top Reasons To NOT Compete
 - **■** Time
 - Specification Alternates
 - Terms & Conditions
 - Information

2014 – Everybody Wins

- Crafting Winning Solicitations
 - Foster Transparency
 - Best Value
 - Collaborative Partnership
- Commodities, Capital Equipment, IT, and Services.
- Recommended Practices
 - Pre-Bid Conferences
 - RFI's
 - Exceptions to Terms and Conditions

2015 – Healthy Agency Supplier Relationships

- Healthy Relationships → Better Procurement Results
 - It's Procurement Professionals **AND** Suppliers, not vs. Suppliers
 - Improve communications and outcomes
- Explore several key questions:
 - What does "better communication" look like?
 - What specific types of activities or exchanges could practitioners and suppliers engage in?
 - What might be the benefits of these activities?

2016 – Total Cost of Ownership

- Discussion about TCO Modeling
 - When to employ
 - How to develop
 - **■** Goods
 - **■** Services
- Example Heavy equipment purchase model
 - Different cost factors
 - Three different proposers with varying cost/price structures

2017 – The Supplier Practitioner Connection – Adding Value to Procurement

- Up-to-date Industry Expertise
 - Pre-RFP Meetings and RFI's
- Information and Building Trust
 - Effective communication about long-term agency goal(s)
- Long-term Contract Performance
 - Build a winning contract that yields performance for years

2018 – The Procurement – Supplier – End User Relationship

- Importance of End User Experiences
 - Benefits Procurement and Supplier
- Building a Progressive Business Review Environment
 - Supplier Rating Systems

2019 – Market Volatility

- Discussion about industry impacts current & forecasted
 - **■** Economic Unrest
 - Taxes & Tariffs
 - **■** Employment Effects

NIGP Chapter Engagement

NIGP Chapter Events

- Business Council Members Lead Discussions
- Schedule Travel For In-Person Conferences/Meetings
 - Support Virtual Events
- Typically Two NBC Members and 1-2 Local Agency Leaders Participate
 - Moderator or Panel Members
 - Members/Audience Interactive
- Contact to Schedule
 - Belinda Sites, NIGP <u>bsites@nigp.org</u>
 - Business Council Members Contact Directly

Visit: https://www.nigp.org/home/find-procurement-resources/guidance/papers

Thank You