## Committee Details

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<th>Date: August 11, 2015</th>
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<td><strong>Committee Name:</strong></td>
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<td>Procurement (OWG #32)</td>
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<td><strong>Committee Co-Chairs:</strong></td>
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<tr>
<td>Michael Davidson &amp; Jim Barnaby</td>
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<td><strong>Functional Area:</strong></td>
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<tr>
<td>Business and Finance</td>
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<td><strong>Functional Area Coordinator:</strong></td>
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<td>Jerry Rackliffe, SVP Finance and Administration, GSU</td>
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List the major tasks your committee will need to take to accomplish your deliverables. Please provide more details for the tasks leading up to the SACSCOC Prospectus development.

## Major Tasks for Committee Tracker from Final Planning Document and Recommendations

<table>
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<tr>
<th><strong>Merge Purchasing Process and Procedures (including Contract Review Process and E-Verify Compliance Process)</strong></th>
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<tr>
<td><strong>Task:</strong> Adoption of Purchasing Policies</td>
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<td><strong>Recommendation and/or Action Taken:</strong></td>
<td>A subcommittee reviewed both GPC and GSU policies and determined that it would be best for both institutions to follow GSU procurement policies. Both institutions mirror DOAS procurement policies and there should be minimal impact on processes.</td>
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<td><strong>Task:</strong> Merging Copiers (adding leases as C/O assets) GPC Copiers are owned, annual maintenance agreement.</td>
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<td><strong>Recommendation and/or Action Taken:</strong></td>
<td>Subcommittee was formed with representation from both institutions. GPC will own copiers at the time of consolidation and there will be no need to merge leases. <strong>Recommends Multi-Functional Devices (MFD) continue to be managed by School (GPC). Copiers will be owned and not leased by GPC at the time of the consolidation. As copiers wear out they should be replaced by the Department either by lease or purchase. Service agreement for maintenance will be the responsibility of the School submitted to procurement via purchase requisition:</strong></td>
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*Since the MFD are the property of GPC and they still have useful life it would be in the best interest of GSU to maintain. Replacing under a new lease would result in business interruption and loss if savings.*

**REASON FOR RETURN:** Too much of a “micro” issue-CIC doesn’t need to get involved in these types of decisions.
| **Consolidation Committee**  
| **Final Report**  
| **Merge Purchasing Process and Procedures (including Contract Review Process and E-Verify Compliance Process)**  
| **Task:**  
| Merging UPS accounts  
| **Recommendation and/or Action Taken:**  
| A subcommittee was formed and determined that merge of UPS expedited delivery services would consolidate July 1, 2016. Preparation would occur in advance, currently GPC has one account per campus for a total of six.  
| **Determine Procurement Systems Consolidation Requirements (PeopleSoft, ePro, GeorgiaFirst Marketplace, P-Card/Works), Merge Common Purchasing Systems**  
| **Task:**  
| P-cards (new cards, training, requirements)  
| **Recommendation and/or Action Taken:**  
| Subcommittee was formed with representation from both institutions and determined that GPC P-card holders and approvers will receive annual refresher training by GSU May 1, 2016. New P-cards will be ordered from BOA April 1, 2016 for replacement of GPC cards, new P-cards will be issued July 1, 2016. FY2015 P-card records will be stored at GSU for reference, prior year records will be stored at GPC’s records department until the destruction date. Consolidate WORKS and load new chartfields April 1, 2016 or upon release.  
| **Determine Procurement Systems Consolidation Requirements (PeopleSoft, ePro, GeorgiaFirst Marketplace, P-Card/Works), Merge Common Purchasing Systems – BLLIP, ARI, and How’s My Driving System**  
| **Task:**  
| Fleet Management  
| **Recommendation and/or Action Taken:**  
| Subcommittee was formed with representation from both institutions and determined to consolidate fleet under the property management team. GPC will consolidate all fleet record to include title, spare keys and documents by 03/01/2016. GPC will move all fleet maintenance under the state contracted vendor ARI July 1, 2016. Vital fleet data and How’s my Driving program will merge July 1, 2016 under a consolidated account. Driver’s qualification records will be turned over to GSU’s fleet manager July 1, 2016. GSU BLLIP will be updated to include GPC Fleet for insurance coverage. List of fleet vehicles will provide for update May 2016.  
| GPC Tags and Registration will be updated with DOR 03/01/2016 and GPC vehicle decaling will be completed by January 2016.  
| **Determine Procurement Systems Consolidation Requirements (PeopleSoft, ePro, GeorgiaFirst**}
### Marketplace, P-Card/Works), Merge Common Purchasing Systems

**Task:**
Systems and training (requesters, shoppers, workflow, etc.)

**Recommendation and/or Action Taken:**
Subcommittee was formed and determined that training would begin with GPC purchasing group beginning 02/1/2016 to include shadow days with GSU procurement staff. Train GPC end-users onsite march – May 2016. Establish workflow and approval once organizational chart is complete and chartfields established.

*Recommends use of GSU’s Panther Mart (Sciquest full suite) system for procurement:*

GPC currently uses the GAFirst Sciquest Sandwich model through Peoplesoft epro. Use of GSU’s Panther Mart system will allow reduction in p-card spend, digital file storage, one sign-in to handle all procurement activity, web base connectivity, contract management, submittal of change orders, submittal of travel, payment requests, and instant access to multiple statewide contracts.

**REASON FOR RETURN:** Per BoR

At the same meeting the CIC withdrew the following recommendation. Although the CIC supports the recommended action, it seemed like it was "too much in the weeds" for CIC consideration. In other words it is an operational decision that did not need to go to the BOR.

### Determine Procurement Systems Consolidation Requirements (PeopleSoft, ePro, GeorgiaFirst Marketplace, P-Card/Works), DOAS: Address Purchasing, Address State Approvals for RFPs-Purchasing Issue, Competitive Solicitation Processes

**Task:**
Bid registry modifications (buyer additions and role assignments)

**Recommendation and/or Action Taken:**
Subcommittee formed and determined to consolidate use of the State’s bid registry as soon as 02/15/2016 in preparation for future contacts as a consolidate entity. Also, will consolidate State Procurement Certification records for GPC under GSU in the same time period. All RFPs, RFQs, RFQCs, Sole Sources, and Sole Brands will be posted as GSU.

### Merge Purchasing Process and Procedures (including Contract Review Process and E-Verify Compliance Process)

**Task:**
Administration, staffing, and office space requirements (location options to meet growth)
### Recommendation and/or Action Taken:
Subcommittee formed and it was determined that it would be best to centralize procurement on GSU main campus while maintaining the central receiving and property management on the Clarkston Campus. Clarkston is near 285 and gives greater access to large freight trucks.

### Merge Purchasing Process and Procedures (including Contract Review Process and E-Verify Compliance Process)

#### Task:
Surplus property and warehousing mergers

### Recommendation and/or Action Taken:
A Subcommittee was formed and determined to centralize surplus activity on the Clarkston Campus, square footage has been reviewed and would require the reduction in current GPC surplus furniture. GPC currently working on reduction of surplus in preparation. GPC and GSU would consolidate store stock, both schools currently carry similar products. GSU property management will review and communicate stock request process to stakeholder May – July, 2016.

### Merge Purchasing Process and Procedures (including Contract Review Process and E-Verify Compliance Process)

#### Task:
Desktop Deliveries for GPC (P-card/Purchase Orders)

### Recommendation and/or Action Taken:
A subcommittee was formed of both GSU and GPC personnel and determine that desktop deliveries would be the best delivery system to minimize confusion among administrative staff, system trainer and carriers. GPC to establish delivery suites by August 2015 to communicate with carriers. Carriers will review, train and establish routes for implementation February 2016.

**Note:** Building naming convention will impact ship to locations and deliveries if not determined early. Recommend waiting until after consolidation has occurred and phase it in.


#### Task:
Fuel Cards

### Recommendation and/or Action Taken:
A subcommittee was formed and determines to communicate GSU Policies and Procedures out to stakeholders 06/01/2016 with follow-ups. Order new fuel cards 04/01/2016 for GPC vehicles and Red Card Users for issue July 1, 2016. Merge WEX fuel account July 1, 2016 and consolidate GPC monthly
fuel reconciliations for FY2015 with GSU Property Management Team. Prior year reconciliation packets will remain with GPC’s record department. Establish card approvals based new organizational structure.

**Recommendation and/or Action Taken:**

A subcommittee was formed and reviewed both GSU and GPC contracts. Contracts have been identified for rebid, extension, renewals or terminations. All actions will follow DOAS guidelines for notification and processing. All contracts that required extension due to the consolidation has received approval from DOAS. Procurement will begin bid/contract development for new agency contracts beginning 02/2016. GPC has GSU procurement boiler plates for use on new bids. GPC is tracking all new licenses, license renewals and agreement by department to determine status under consolidation.

**Address vendor codes, Vendor Registration and Vendor Database Cleanup and Consolidation, Merge Purchasing Process and Procedures (including Contract Review Process and E-Verify Compliance Process)**

**Task:**

Vendor additions (TSM adds and training)

**Recommendation and/or Action Taken:**

A subcommittee was formed and identified just over 500 unique vendors for GPC. GPC is gathering emails and GSU is sending invites to these vendors. GPC Unique vendors will be in GSU database on or about 10/2015. All new vendors will be supplied with a GSU vendor data form and added to both GPC vendor database and sent an invite from GSU.

**Address Purchase Orders- Existing, New, and Encumbrances (PeopleSoft)**

**Task:**

GPC Open Encumbrances

**Recommendation and/or Action Taken:**

A subcommittee was formed and determined the best plan to migrate GPC open encumbrances to GSU Panther Mart. GPC discussing plans to reduce encumbrances at year-end FY2016 for easier
migrate. Will increase P-card spend at the end of the year in order focus more on closing of POs and reducing the amount encumbered. This will include GPC expense module and paper payment requests. Spectrum is reviewing the best way to migrate open encumbrance.

### Merge Purchasing Process and Procedures (including Contract Review Process and E-Verify Compliance Process), Determine Procurement and Contracting Reporting Systems Requirements (PeopleSoft, iStrategy, SAS, P-Card/Works)

**Task:**
Reports

**Recommendation and/or Action Taken:**
Committee was formed and determined the critical reports to be the immigration & security and the annual CUPO audit reports. Immigration & security report will be maintained by both schools in the DOA reporting format for easy consolidation. GPC and GSU will maintain separate immigration data thru 06/30/2016. GSU/GPC will consolidate immigration data from 12/01/2015 for future report. GPC and GSU to conduct separate internal audits from 01/01/2016 thru June 30, 2016 and then as a consolidated entity from July 1, 2016 thru 12/31/2016. First two quarters of GPC spend will not be reported as part of the self-compliance audit.

### Merge Purchasing Process and Procedures (including Contract Review Process and E-Verify Compliance Process)

**Task:**
Archiving and destruction of purchasing related records (storage?)

**Recommendation and/or Action Taken:**
A committee was formed and determined that GPC FY2015 records will be transported and maintained at the GSU procurement office. All other procurement related documents will be maintained at Clarkston in the records department until slated for destruction.

### Other/Final Comments (if any):