

Purchasing Services

Mission

OSU-Okmulgee Business Affairs, Purchasing Services provides the campus with accurate and timely processing of the procurement of goods and services through compliance with University policies, State and Federal regulations, and external partnership expectations.

Vision

OSU Okmulgee Business Affairs Purchasing Services will enable our campus customers to acquire goods and services efficiently, cost effectively and according to policies and guidelines.

- Be customer focused; and
- Have a genuine concern for our customers and their needs; and
- Maintain a positive/helpful attitude; and
- Be an asset to the campus community.

Core Values

Excellence – We seek excellence in all our endeavors, and we are committed to continuous improvement.

Intellectual Freedom – We believe in ethical and scholarly questioning in an environment that respects the rights of all to freely pursue knowledge.

Integrity – We are committed to the principles of truth and honesty, and we will be equitable, ethical, and professional.

Service – We believe that serving others is a noble and worthy endeavor.

Diversity – We respect others and value diversity of opinion, freedom of expression, and other ethnic and cultural backgrounds.

Stewardship of Resources – We are dedicated to the efficient and effective use of resources. We accept the responsibility of the public's trust and are accountable for our actions.

Goals, Critical Success Factors, Objectives, and Strategies

Goal One. Enhance the understanding and use of the University purchase card system to provide secure and efficient purchasing of products and services.

Critical Success Factors:

- 3 ProCard professional development training sessions per year
- One on one ProCard training for approvers 1 day per month
- 2 ProCard reviews per month
- 6 Purchasing E-News letters per year

Objectives:

Objective 1.1: Provide training sessions to all ProCard holders.

Strategies:

- Conduct ProCard refresher sessions 3 times a year during Professional Development Days.
- Include training on process to download data from PVSnet into Excel for budget tracking.
- Utilize Stillwater representative for one refresher class per year.
- Advise all employees of ProCard training schedule on Okmulgee and Stillwater campuses.
- Encourage supervisors to attend refresher sessions for better understanding of ProCard purchasing.
- Provide informal question and answer sessions 2 times a year.

Objective 1.2: Provide one on one training to all approvers.

Strategies:

- 1 day a month, contact active approvers for one on one training.
- Enhance communication with approvers through monthly electronic and personal contact.

Objective 1.3: Review ProCard records for each area annually.

Strategies:

- Develop review / audit process by June 30, 2004.
- Develop a schedule to review a minimum of 2 areas each month.
- If issues were found, follow up in 30 to 60 days to see if recommendations have been implemented.
- Share unit processes with other units during review process and refresher/training sessions.

Objective 1.4: Provide vendor sources to all ProCard holders.

Strategies:

- Develop vendor resource area on the OSU-Okmulgee Purchasing web page or ProCard folder. Include vendor information, pricing agreements, etc.
- Update Licensed Vendor and Oklahoma Licensed Vendors list on shared drive annually or as updates are received from Stillwater.
- Promote use of Oklahoma vendors for Economic growth.
- Provide vendor contact information to campus to increase quality of service.
- Provide mechanism for units to document good buys and service experiences so we can pass this information on to other units.
- Encourage units to get 2-3 quotes before placing an order to ensure the best use of university funds.

Goal Two. Enhance the transfer of information with campus customers through electronic means.

Critical Success Factors:

- 100% of ProCard expenditure documentation to be transmitted to OSU-Okmulgee purchasing via email and scanned documents by September 1, 2004
- ProCard area on OSU-Okmulgee web page by June 30, 2005
- 100% utilization of ProCard database or alternative method for tracking ProCard expenditures by July 1, 2004

Objectives:

Objective 2.1: Enable units to scan ProCard documentation.

Strategies:

- Develop ProCard scanning instructions.
- Conduct one on one training as needed or requested.
- Include scanning instructions in all ProCard refresher training sessions.

Objective 2.2: Utilize OSU-Okmulgee Purchasing web page and E-Notes for Purchasing updates, reminders, etc.

Strategies:

- Have article in E-Notes monthly.
- Request input from units regarding good buys they have made, a vendor who has provided exceptional customer services, etc.

Objective 2.3: Provide units with understanding to track requisitions, budget, etc using FRS system.

Strategies:

- Coordinate with OSU Okmulgee Accounting to update FRS Training document.
- Conduct training session available to employees at least once per year.

Objective 2.4: Develop enhancements to Access database for ProCard expenditure tracking.

Strategies:

- Survey users for input on changes/updates they would like to see implemented.
- Coordinate with CIS to get budgets working correctly.
- Provide training on the use of the ProCard database during Professional Development Days.
- Review status of data base system by September 2004.

Goal Three: Assure successful operations and business continuity by developing and implementing relevant policies and procedures consistently across the campus.

Critical Success Factors:

- Current Purchasing Policies and Procedures posted on OSU-Okmulgee Purchasing web site
- Current ProCard Guidelines posted on OSU-Okmulgee Purchasing web site

Objectives:

Objective 3.1: Review and revise Purchasing policies and procedures.

Strategies:

- Designate a person to be responsible for the annual revision.
- Gather data continually as items come up to ensure they are included in revision.
- Have Policies and Procedures available on OSU-Okmulgee Purchasing web site.
- Notify campus that revised information is available via E-Notes.

Objective 3.2: Increase utilization of OSU-Okmulgee Purchasing web page.

Strategies:

- Send electronic reminders to all employees as updates are made to the OSU-Okmulgee Purchasing web page.
- Provide instructions on purchasing by ProCard, Requisition, or small order on OSU-Okmulgee Purchasing web page.
- Have area for “Frequently Asked Questions” “Don’t Fall Into This Trap” (Toner cartridge scam, advertising scams, office supplies, use general store, etc.) Best Buys, Star Suppliers, etc.

Objective 3.3: Review campus purchases to ensure purchasing guidelines are being followed.

Strategies:

- Review ProCard purchases via PVSnet weekly.
- Review Small Order purchases daily.

Objective 3.4: Coordinate units in utilization of group purchasing/pricing agreements.

Strategies:

- Encourage group purchasing for cost savings to the university.
- Survey units regarding estimated quantities used annually for high use items.
- Combine like items from all units.
- Prepare competitive quote/bid for annual purchases.
- Post results on OSU-Okmulgee Purchasing web page and announce via E-Notes.

Goal Four: Promote a cohesive teamwork atmosphere by proactively sharing information, ideas and effectively resolving issues.

Critical Success Factors:

- Cross training process in place by June 30, 2004
- Desk Manuals in place for each position by Dec 31, 2004
- Portfolios in place for each employee by June. 30, 2005

Objectives:

Objective 4.1: Implement a cross training process in the purchasing office to better utilize human resources.

Strategies:

- Share information within the Purchasing office to better serve our customers.
- After attending professional development session each employee should share information with others to expand knowledge in area.
- Enhance communication within area.
- Schedule weekly sessions to share information.
- Develop “Where to find list” to easily access requisitions, small orders, ProCard or other records.

Objective 4.2: Develop desk manuals for each position.

Strategies:

- Develop a time line for completion of desk manuals for each position.
- Combine each manual into one “Purchasing Office” manual.
- Continually update manual as need arises.
- Update and reprint annually.

Objective 4.3: Develop and maintain Portfolios for each employee.

Strategies:

- Develop a time line for completion of portfolios for each position.
- Continually update to keep portfolios current.