

# CSCU | Students First

<b>Planning Team</b>	<b>Purchasing Sub-team Meeting Minutes</b>
<b>Meeting Date</b>	June 27, 2017
<b>Members Present</b>	Esther Boriss, Thomas Brodeur, Charlene Casamento, George Claffey, Jim Kelly, Alessandra Lundberg (via telephone), Cynthia Shea-Luzik and Robin Orlomoski (via telephone)

## Meeting Notes

- Overlap between the different modules in the Jaggaer solution was discussed. Charlene has asked BJ from Jaggaer to assist us in wrapping our arms around the functionality of each module by creating a chart which will identify overlap between the modules.
- Charlene will ask Erika Steiner for the cost proposals from Jaggaer previously submitted to the CSCU. The quotes are based on the CSCU “piggy-backing” off of UCONN’s contract with Jaggaer. Charlene will also ask Erika for a copy of any notes from the CSCU discussion with UCONN.
- The group finalized follow up questions to Jaggaer.
- For July 31<sup>st</sup> preliminary report regarding the group’s recommendations on the Jaggaer solution. Things to take into consideration:
  - o Is there an opportunity to develop a UCONN/CSCU partnership or at least enable CSU to utilize the UCONN marketplace by receiving view access?
  - o Does the CSCU have technical/administrative support to implement and administer the solution?
  - o Consideration of “bandwidth” for technical support given the significant number of critical projects
- Charlene to reach out to Matt at UCONN to see when he might be available to meet with our team.
  - o Questions for UCONN – What percent of product (Jaggaer) has UCONN implemented and is fully using? What percentage of the end users have adapted to the new system? What approach did they use in targeting contracts and targeting users to kick the system off??

- Cynthia agreed to contact Carol Wilson at DAS and discuss their on-line procurement system as well as CORE CT and whether or not that could potentially provide the CSCU with some access to the DAS contract catalogs.
- Alessandra raised the question of whether or not we should consider issuing an RFP rather than just recommending the Jaggaer solution. The group discussed that we likely could access the solution via the UCONN contract and also could access it via an E&I solution. The group discussed that whether or not we partner directly with UCONN that there could be indirect benefits to the system as it would be easier to share contracts, a resource to call upon when needed and possible joint purchasing initiatives.
- Jim spoke about ESM(?) on-line solution that the System Office had in for a demo when it was exploring the Jaggaer. He said that it falls short of what the system would need as far as functionality goes. Jim said that he would find his notes from when this system was looked at and share them with the team.
- George mentioned that he would be able to obtain information from Gartner Group. Gartner reviews different solutions and George sent a copy to the team of Gartner's Hype Cycle for purchasing solutions.
- George agreed to set up a call between our team and Gartner to discuss the ROI for specific solutions.
- The team discussed questions for Jaggaer around supplier catalogs and different pricing options.
- The Team discussed account codes (new common chart of accounts) and roll-up of accounts. Alessandra pointed out that the new chart of accounts does make some separation between categories (i.e. office supplies vs. technology supplies).
- The question also came up about looking more closely into the functionality that Banner 9 will offer us. A demo has since been scheduled to more fully explore Banner 9.
- Charlene discussed the upcoming Banner demonstration and solicited opinions from the team as to how many people should be invited. Should we open the demo up to other stakeholders to accommodate approximately 75 people at this time? The feeling of the group, given the short time frames and the narrow focus of our objective that it would be more beneficial to the purchasing team if we kept the attendees to just our group while making the demo available on the website if others would like to view it.
- The team discussed the Procurement Director job description that Cynthia had submitted. The group agreed that there was some overlap between the Director of Purchasing and

Director of Contracts duties. The team made suggestions for language that could be added to the Purchasing Director position such as requesting professional certifications (i.e. CPM) and that the Director of Purchasing's job description would need to place strong emphasis on "ownership" of the purchasing process. Cynthia agreed to make some revisions and then resubmit to the team for consideration.

- Alessandra and Esther said that they would finish compiling the information that they received in response to their request to the University's and CCCs as to what services could be shared vs. what services were required to be performed at the campus level. Alessandra also sent out an overview of the SEEC report.
  
- The group discussed that it was important that our savings target be realistic and acknowledged that the percentage we will save depends on the degree of management that is currently in place. George scheduled a meeting with system office support to discuss pulling a data set about the top 20 vendors that are currently being used, so the team could find out the vehicle being used to access the vendor.