**NIGP Agency Advancement Award Application.**
**William & Mary**
**Continuous Improvement Project: Campus Catering Transformation**

**Project Summary:** Procurement Services identified a need to improve food buying infrastructure on campus due to the increased administrative burden being placed on university purchasers through existing processes, increased rates of non-compliant food purchasing, limited visibility by the campus community of vetted catering sources, and limited visibility of institutional food expenditures for sourcing opportunities. In April 2018, William & Mary contracted with a third party supplier, America To Go (ATG), to provide concierge catering service to campus in an effort to improve the university’s food buying infrastructure. Procurement Services began project planning and configuration of business rules within the ATG portal to offer users a guided buying environment through vetted vendors. Procurement Services communicated the change initiative to the campus community through delivery of over 100 information and training sessions in hands-on and remote formats. In September 2018, use of the ATG portal was mandated for all on-campus food orders other than dining services. At present nearly 3,000 orders totaling over $1.1 million have been routed through the ATG portal and the institution has improved visibility of food data. The ATG program has resulted in less administrative effort required by end-users, non-compliance rates on food purchasing reduced from nearly 50% to around 7%, and an estimated savings of $10,000 in tax paid on food purchases compared to prior year activity.

**Assessment:** William & Mary’s Procurement Services identified a need to address the procurement of food through feedback from campus on challenges with food buying and institutional data showing high rates of non-compliance. End-users expressed frustration with the burdensome process of preparing, documenting and reconciling food payments, as well as the lack of clarity surrounding the university’s business meal policy. Procurement Services observed an average of 50% non-compliance on food orders where required information or documentation was found to be incomplete.

A business case was developed to assess food expenditures and identify opportunities in the commodity area. It was found that William & Mary’s annual food expenditures totaled an estimated $3.25 million of which $1.3 million were determined to be catering expenses. The America To Go concierge catering program was assessed and determined to solve many of William & Mary’s food buying issues. ATG’s centralized portal gives university employees online access to local area restaurants vetted by an ATG Account Manager. The online portal offers users guided buying with integrated university business rules, the ability to code expenditures to general ledger segments and a consistent check-out process for all enrolled businesses. This
system was determined to allow greater transparency of food expenditures while offering campus a more competitive marketplace with added benefits such as the collection of certificates of insurance for program vendors by ATG.

The business case, recommending use of America To Go available through a cooperative contract, was shared with the university’s senior leadership to seek buy-in at the top level of the administration. With the university’s CFO as the institutional sponsor and agreement among other senior leaders on the direction of the project, Procurement Services contracted with ATG and moved into project planning.
Planning: A core project team containing university employees from Procurement Services, Financial Operations, Auxiliary Services and Information Technology, as well as ATG operations and IT staff, was formed to work on ATG implementation. Procurement Services led implementation planning efforts and consulted with representatives to identify tasks related to their area of expertise. Food expenditure data was reviewed for two prior fiscal years to identify local area vendors for initial program on-boarding by ATG. The core project team reviewed university business meal policy to begin building logic for guided buying rules within the ATG portal. Procurement Services coordinated focus group sessions and communication the initiative to campus through over 100 info sessions and training in hands-on and remote formats.

Implementation: Procurement Services worked with IT and ATG to install guided buying rules in the ATG portal and worked through the data transfer processes for accounting information and expense data. Concurrently, ATG solicited local area vendors to join the program and was able to on-board 32 vendors in the initial on-boarding phase. When the portal was configured and vendor menus were loaded into the portal, William & Mary announced a soft launch on August 1, 2018. Procurement Services continued to offer hands-on and remote training throughout program implementation. The program was mandated for on-campus use on September 1, 2018. ATG continued vendor on-boarding based on campus need communicated by end-users.
Procurement Services continues to provide regular campus updates through email, newsletter and daily community email.

**Results:** At present, ATG has been mandatory for seven months and has 62 vendors available for use by university employees. Nearly 3,000 orders totaling over $1.1 million have been routed through the ATG portal leading to improved visibility of food purchasing by the institution. The ATG program has resulted in significant improvement in administrative efficiency for end-users, 24/7 user access to ordering portal, improved vendor management (one primary instead of dozens of small vendors), improved risk mitigation for the university through assurance of regulatory compliance (health inspection, business license, certificate of insurance), streamlined payment process, opportunity to feature small businesses. Non-compliance rates on food purchasing which averaged 50% have been reduced to around 7%. The university has seen an estimated savings of $10,000 year-over-year erroneous tax payments on food orders. Next steps will focus on continuous improvement through added focus on sustainability, and ultimately integrating the process into the campus eProcurement system.

Additionally, the five-year W&M Strategic Procurement Plan illustrates priority focus on dynamic technology solutions to streamline procurement activity, support compliance, and improve results, to include guided buying and more specifically ATG:

The link to the website containing the William & Mary Procurement Strategic Plan can be found here:

https://www.wm.edu/offices/procurement/aboutus/index.php

The plan .pdf may be directly accessed at the following link:


Pages 2 and 8 of the plan are included below:
Strategic Procurement Plan
Fiscal Year 2018 – 2022

Procurement Priorities

Value — Service — Quality

CUSTOMER-CENTRIC FOCUS
Partner with stakeholders to anticipate and meet client needs. Be a trusted advisor for the campus community.

DYNAMIC TECHNOLOGY SOLUTIONS
Adopt technology solutions that streamline procurement activity, support compliance, reduce lead time and improve information results.

TALENT DEVELOPMENT
To recruit, engage, and retain skilled and motivated professionals capable of delivering value-added procurement.

TRANSPARENT PROCESSES
Establish clear direction and oversight of decentralized procurement activities and performance under established thresholds.

VALUE, INNOVATION, AND INCLUSIVE EXCELLENCE
Provide best value contracts that deliver savings, introduce innovation, and support the campus community.

DATA DRIVEN, SOLUTIONS FOCUSED
Deliver timely, reliable information to the campus, frame historical data, project trends in partnership with campus clients, and forecast market changes.
Dynamic Technology Solutions

Adopt technology solutions that simplify procurement activity to support compliance, reduce lead time, and improve information and results.

Provide resources to campus in a highly efficient manner.

Create an environment where technology is shared.

Enhance Supplier relationships.

Expand electronic forms/applications and improve electronic workflow to improve efficiency.

Implement technology solutions to assist with compliance.

Procurement Services will:

Maximize the use of and support for electronic procurement throughout the life cycle of a transaction: from development of specifications through contract administration and close out.

Deliver an enhanced procurement training solution for internal clients.

Be a pioneer for relevant W&M technology solutions: Panopto, Zoom, Cobblestone, Qlik.

Create and Communicate procure to pay tools to campus clients.

Establish satisfaction surveys for users post-training to measure effectiveness and opportunity for improvement.

Convert at least three (3) forms to electronic format for signatures.

In FY2019, our success will be measured by:

Explore opportunities to adopt and practice guided buying (ATG, Amazon Business, Jaggaer). Present management with a recommendation and ROI analysis for a dynamic source-to-settle software solution to improve client experience (ease of use, budget checks, accurate encumbrance management, access to contracts, robust reports).

At conclusion of each semester, measure number of web hits to procure to pay matrix to understand its value to campus (this has the potential to reduce process time).

Create a unified “forms” webpage for finance department.

Maximize functionality of new contract management system through workflows and automated features. Establish goal for 80% of W&M specific contracts to begin renewal/resolicitation action 180 days prior to end of term.

Explore completion of two fully electronic contract record files, from solicitation to post-award activity.

Manage signature authority access and user profiles through technology.

Maximize eVA functionality where outcome is better, including greater visibility of data, or streamlining processes.

Work to expand system generated reports through Qlik.
Project activity was a daily routine, and project tracking was managed on a monthly basis. An example of reporting from the departmental monthly project plan is included below.

**Survey of ATG Users**

To measure early feedback on success, failures, and need for improvement. Based on results, several new features were requested of ATG, and several process changes were made by W&M. A second survey launched on 4/17/2019. Results will be compiled and analyzed to find opportunities for continued improvement.

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**Procurement Office FY2019 Project Plan**

**December 2018**

<table>
<thead>
<tr>
<th>Active Projects</th>
<th>Listing of currently active projects by Procurement Office.</th>
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</thead>
<tbody>
<tr>
<td><strong>Spend Analysis</strong></td>
<td>Maximize access to spend data for the institution. Analyze spend by vendor, department, and greater granularity. Create standard spend reports using available tools to assess impact to institution and peer institutions (VHEPC and VASCUPP) to drive improved outcomes.</td>
</tr>
<tr>
<td><strong>Procurement website</strong></td>
<td>Refresh of procurement website to create clear paths for interested audiences. Goal of transparency, ease of accessing information (reduce # of clicks).</td>
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<tr>
<td><strong>Procurement Dashboard Maintenance</strong></td>
<td>Continue and refine a monthly dashboard to aggregate procurement data. Dashboard will serve as a central reporting tool for procurement reporting and to communicate with campus.</td>
</tr>
<tr>
<td><strong>America To Go Catering Concierge Implementation</strong></td>
<td>Enterprise-wide guided buying concept for catering</td>
</tr>
<tr>
<td><strong>Business Process</strong></td>
<td>Review existing processes including forms</td>
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</tbody>
</table>
Two campus users submitted the following comments about their overall impressions of ATG in the April survey, acknowledging both the weaknesses and the strengths of the program so far:

“While a challenge initially, with many teachable moments, ATG seems to be working well for the majority of folks at W&M. It has brought in a large number of catering options, which is great for variety.”
- Member of University Events

“America To Go is still working out the kinks, but it has definitely come a long way since September. Thanks for all your hard work!”
- Member of University Advancement