

**Formstack Submission For: [Agency Advancement Award 2020](#)**

Submitted at 05/15/20 3:16 PM

**Date Implemented: :** Sep 2018**Title of Program or Process Improvement:** Campus Catering Transformation**Name:** Erma Baker**Designation(s):** CPPO, CUPO, VCO/VCM, VCCO**Title:** Director**Agency:** William & Mary**Address:** Box 85  
Williamsburg, VA 32187**Email:** [procure@wm.edu](mailto:procure@wm.edu)**Phone:** (757) 221-3952**Cell Phone:** (540) 847-5478**Program or Process Improvement Summary:**

William & Mary “W&M” Procurement Services, with dedicated support from IT, and Finance, improved the infrastructure for purchasing food and catering services on campus to ensure compliance, reduce administrative effort, improve small business participation and sustainability, promote transparency, and meet client needs. The team engaged a third party contract partner and together effectively introduced a concierge catering concept with rules-based guided buying that was implemented on an enterprise-wide basis. The effort improved efficiency, compliance, transparency, and client satisfaction.

#### Evaluation Criteria #1:

William & Mary, a higher education campus in Virginia serving 8,400 students and 2,500 employees, identified university spend of approximately \$2 million annually on catering purchases with off-campus providers; the university had no solution to effectively manage those purchases. The decentralized model for purchases proved problematic, and because of the many regulations around food and business meals this category proved to be a high compliance risk for things like adherence to per diem limits, paying tax on tax-exempt purchases, and more. General non-compliance in a given month could be as high as 40%, yet for seemingly small infractions. Similarly, campus users were distributed throughout campus without clear guidance on service providers.

W&M considered options of issuing a multi-award RFP to select multiple catering providers, or selecting one provider to deploy a concierge concept catering program and manage multiple catering businesses, ensure compliance with health regulations, validate insurance coverages, and manage performance of caterers. The option to solicit an RFP and award to multiple providers presented challenges to manage and monitor. Through the proposed concierge contract, W&M was able to utilize a cooperative contract with a single firm America-To-Go, "ATG" to establish a central hub for William & Mary users to purchase food and catering services. During the course of our research, we reviewed case studies from institutions (Emory, UVA, and others) who had deployed the concierge catering model with documented success, we interviewed campuses and participating caterers and opted for the concierge model W&M envisioned an enhanced user experience through the development of a centralized portal granting access to pre-qualified local catering and restaurant options, with rules-based ordering.

As an added benefit, departmental food purchases were traditionally paid using a corporate credit card with no upfront approvals or transparency, the new catering

solution offered campus users the ability to successfully meet needs with embedded approvals and transparency while ensuring compliance with state and university policy.

The result of the analysis revealed the opportunity for a streamlined end-user experience through:

- Use of a single process and interface for food ordering
- Access to numerous vendors to improve choice and information on restaurant and catering options.
- Greater transparency and embedded business rules in the ordering process will lead to a more competitive marketplace
- Assist campus clients easily work within regulations
- Support of special orders
- Provide access to order history if they choose to duplicate a past order.
- Users will receive 24/7 customer service, searchable menus and saved favorites through their online interface.

The decision to centralize campus food purchasing was a transformative project. It involved major project management and executive support. The NIGP principles and practices of public procurement were demonstrated through accountability as evidenced through data driven decisions, client centric focus, while demonstrating a high level of stewardship of university and tax payer funds. The project allowed for added inclusive excellence by highlighting and encouraging the use of small, woman-owned, and minority-owned suppliers, as well as businesses modeling sustainable practices and demonstrating sound corporate social responsibility. The choice to use a cooperative contract that was subject to open and fair competition, and in compliance with a stated Code of Ethics, provided guidelines for integrity around the process.

The project delivered a new level of service for university faculty, staff, and students. Ease of ordering, assurance

of compliance (less hassle), and improved transparency on expenditures.

Planning: A project plan was drafted and an executive sponsor assigned. A core project team was formed containing university employees from Procurement Services, Financial Operations, Auxiliary Services and Information Technology, as well as ATG operations and IT staff, to work on ATG implementation. Procurement Services led implementation planning efforts and consulted with diverse campus constituencies. 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 policies to begin building logic for guided buying rules within the ATG portal. Procurement Services coordinated focus group sessions and communicated the initiative to campus through over 100 info sessions and training in hands-on and remote formats. Ultimately on-line training was created for “on-demand” 24/7 access.

#### Evaluation Criteria #2:

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.

Challenges: At 326 years old, W&M is the second oldest

public higher education institution in the nation, changing behavioral habits does not come easy. The new concept involved training and more training, surveying the campus population, and ongoing communication. The fact that executive leadership endorsed the project initially and assisted with the original communication to campus was helpful. While there were some eager and very satisfied early adopters, the first six months were painful as ATG and W&M worked to increase the available caterers within the program. Within six months to a year campus clients realized the improved workflow, reduction in pCard activity/reconciliation, and ease of compliance.

**Evaluation Criteria #3:**

Absolutely. The project delivered:

- Use of a single process and interface for food ordering
- Access to numerous vendors to improve choice and information on restaurant and catering options.
- Greater transparency and embedded business rules in the ordering process will lead to a more competitive marketplace
- Assist campus clients easily work within regulations
- Support of special orders
- Provide access to order history if they choose to duplicate a past order.
- Users will receive 24/7 customer service, searchable menus and saved favorites through their online interface.

Additional benefits included the creation of a dashboard to measure utilization of small, woman-owned, and minority-owned businesses, and a second dashboard to measure usage of businesses engaged in sustainable practices.

We saw improvement on per diem, tax, and tip compliance are built into the ordering process to assist campus departments' adherence to university guidelines, while reducing the need for post transaction audit. There is no charge to the university for ATG service, ATG does impose a commission-based fee on caterers enrolled in

their program. Fees vary based on the speed of vendor adoption and the vendor's relationship with the university (i.e., preferred contractor, diverse partner, etc.). ATG contract language states that caterers are not permitted to pass on fees imposed by ATG onto William & Mary through additional service charges. Additional benefits of ATG service include consolidated billing to assist with Prompt Pay requirements and verification of health and insurance certifications.

As stated in #1.d, the decision to centralize campus food purchasing was a transformative project. The NIGP principles and practices of public procurement were evident through all aspects of the project. The project was high visibility and involved accountability of the decision to make a change, the steps in the process, and validation of outcomes. The project delivered improved outcomes, and effective stewardship of university and tax payer funds, while maintaining a client centric focus. The project supported inclusive excellence by highlighting and encouraging the use of small, woman-owned, and minority-owned suppliers, as well as businesses modeling sustainable practices and demonstrating sound corporate social responsibility. The choice to use a cooperative contract that was subject to open and fair competition, and in compliance with a stated Code of Ethics, provided a guideline for integrity around the process. The project delivered a new level of service for university faculty, staff, and students. Ease of ordering, assurance of compliance (less hassle), and improved transparency on expenditures.

**Evaluation Criteria #4:**

The project delivered an effective system for purchasing food on campus.

- It introduced a guided buying model for food purchases.
- The system reduced the rate of non-compliance on food ordering
- Easier system for employees to find vet vendor options
- Reduced burden of contracting with multiple suppliers and request/maintain documentation like annual COIs.

Compliance rates improved by up to 40%, including: per diem, tax, and tip compliance are built into the ordering process to assist campus departments' adherence to university guidelines, while reducing the need for post transaction audit.

William & Mary adopted the new system as a mandatory approach to purchasing catering. There was some early resistance to another requirement, but as the new program delivered value the satisfaction rates increased. Additional improvements have been added with dashboards to measure supplier diversity and sustainability. Supplier reporting has improved to meet client need, and explorations are underway to embed a rating system to recognize strong performance among caterers in the program.

This program is available and scalable for other public entities. The early onboarding of a diverse supplier base as members of the ATG program will assist in driving constituents to the program.

William & Mary established a scorecard for the partnership to jointly establish goals for continued improvement, to effectively monitor of supplier performance.

**Program or process improvement supporting what you have written above:**

[View File](#)

**Documents showing the success of the program or process improvement within your agency?:**

[View File](#)

**Supporting documents showing the success of the program or process improvement outside your agency?:**

[View File](#)

Copyright © 2020 Formstack, LLC. All rights reserved. This is a customer service email.

Formstack, 11671 Lantern Road, Suite 300, Fishers, IN 46038