Spread the Word! Successful Communication

Georgia Procurement Conference 2017

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Georgia Institute of Technology
What would you do if ....

You were told that the only way you could spend money is if you could fold it this way?
Communication Delivery

**Written Word**
- Emails
- Reference materials
- Training materials

**Non-Verbal**

**Person-to-Person**
- Meetings
- Phone
- Group training
Effective Commination

# Questions
1) Who is your audience?
2) What is your message?
3) When is the information needed?
4) How will it be delivered?
Email

- Use subject line to identify a clear topic
- Keep the message simple
- Create bulleted lists for clarity when applicable
- Be polite (not too abrupt/not too mushy)
- Watch your tone
- Proofread!
Online

Qualities of Effective Websites

- Good use of real estate
- Simplicity
- Functionality
- Usability
  - Three-click rule
  - Success clicks
- Descriptive links

- Procurement
- Training
- Forms
- Contact information
Create Useful Documents
Sourcing Determination

**Sourcing Determination Diagram**

- **Sole Source**
  - $15,000 to $25,000
    - Complete Sole Source Justification form in BuzzMart or attach form to BuzzMart Request (RQ).
  - Purchasing reviews for accuracy, sole source verification & other required documentation.
  - Purchasing Approves RQ.
  - Purchase Order Issued to Supplier.

- **Competitive Bidding**
  - $15,000 to $25,000
    - Dept. identifies goods/services required & conducts market research.
    - Purchasing enters RQ in BuzzMart & attaches specifications that include: installation requirements, acceptance testing, estimated dollar value & suggested suppliers.
  - Purchasing reviews RQ & documentation. Purchasing contacts Dept. to kick-off competitive bidding process. Purchasing provides written timeline.
  - Sourcing event closes. Bids are tabulated with input from Dept. Award is made to the lowest bidder that meets requirements.
  - Purchase Order Issued to Supplier.

- **Purchase Order issued to Supplier**
Sourcing Determination

**Sourcing Determination Diagram**

- Use case: When the solution is complex and/or the cost is high, this approach may include a combination of goods and service. Award is based on the lowest price.

#### Competitive Proposals
- Department drafts specifications that include installation requirements, acceptance testing, estimated dollar value & suggested suppliers.
- Purchasing updates B2BMart RFI to reflect award.
- Purchasing contacts Dept. to kick-off competitive proposal process.
- Purchasing & Dept. review specifications to determine if request for proposal process will provide the best outcome. RFIs allow for multistep processes, negotiation, and discussion. RFIs require a commitment from panelists to review and score submitted proposals. Purchasing will provide written timeline for process.

- Process has the potential to take longer to conduct due to review and scoring.
- Process has the most flexibility, allowing for multiple steps and negotiation.
- Requirements are based on the estimated dollar value of the purchase.

#### Request for Information
- Goods/Service are Identified
- Purchasing & Dept. collaborate to invite multiple suppliers to provide insight to current market conditions or product roadmap or research & development efforts.
- Two or more suppliers must be contacted to participate. Process may be conducted informally or formally through a sourcing event.
- Information from suppliers is analyzed to write specifications and requirements.
- Specifications are used to create competitive sourcing event.

#### Request for Qualified Contractors
- Goods/Service are Identified
- Purchasing & Dept. determine that it would be more effective to qualify suppliers prior to competitive event.
- Purchasing & Dept. identify qualified/certifications/licensed/etc., that suppliers must have.
- Purchasing creates sourcing event & posts event on GT’s sourcing website.
- Only qualified suppliers are eligible to participate in competitive bidding/proposals.
# Posting Requirements

## DEPARTMENT OF ADMINISTRATIVE SERVICES – STATE PURCHASING

### POSTING REQUIREMENTS

#### Requirements for Request for Quotation and Request for Proposals

<table>
<thead>
<tr>
<th>If estimated contract value is...</th>
<th>Then, minimum posting period is...</th>
<th>And Notice of Intent to Award (NOIA) posting is...</th>
</tr>
</thead>
<tbody>
<tr>
<td>$25,000 to $99,999.99</td>
<td>Minimum 3 business days</td>
<td>Recommended, not required</td>
</tr>
<tr>
<td>$100,000 to $249,999.99</td>
<td>Minimum 5 business days</td>
<td>10 calendar days</td>
</tr>
<tr>
<td>$250,000 or greater</td>
<td>Minimum of 15 calendar days</td>
<td>10 calendar days</td>
</tr>
</tbody>
</table>

#### Sole Source & Consortia Purchases

<table>
<thead>
<tr>
<th>If estimated contract value is...</th>
<th>Then, minimum posting period is...</th>
</tr>
</thead>
<tbody>
<tr>
<td>$25,000 to $249,999.99</td>
<td>5 business days</td>
</tr>
<tr>
<td>$250,000 or greater</td>
<td>15 calendar days</td>
</tr>
</tbody>
</table>
Procure-to-Pay Process
Forms

Forms are documents that provide and request information.

- Ask for the information you **need**
- Consider the value of the information requested
- Create fillable forms that are easy to use
- Use online tools
Identify the Audience

Avoid global distribution of information that only has value to a small population

INSTRUCTIONS FOR ENTERING COPY MACHINE REQUISITIONS IN BUZMART

The following information should be included with copy machine requisitions in BuzzMart. The information may be entered in the line item description.

Lease Information
Sample
Contract Number SWC # 90819.05
Contract Term Number of months contract is for. (Typically 36, 48 or 60 months)
Payment Period Months: 10 to 22
Equipment Serial Number XEH1599834
Equipment Name: 6746APT
Previous Purchase Order Numbers 0000124578
*If the lease is paid monthly, enter 12 each at payment amount.

Copy Information
Payment for copies Enter the total amount to be encumbered for copies to be paid by the unit, e.g., 1000 each at $1.00
This will allow incremental payments until the encumbrance is depleted.

Other helpful information:
NIGP Codes
96526 Copy Machine (including Cost-per-Copy) Rental Lease
(Use this code for monthly lease costs and cost-per-copy)
93927 Copy Machine Maintenance and Repair
(Use this code for maintenance agreements and cost-per-copy charges)

External Attachments
Contract and any addenda
Contract renewal information provided by supplier
Face-to-Face Communication

Benefits
- Prioritization
- Collaboration
- Creativity
- Interaction
- Interpretation
- Organization

Risks
- Time
- Money
Strategies for Successful Business Meetings

- Select the right participants
- Create an agenda (and stick to it)
- Open meeting on time
- Establish a professional environment
- Wrap-up with a review
- Set next meeting date and time
- Close on a positive note
## Learning Styles

<table>
<thead>
<tr>
<th>Visual Learners</th>
<th>Auditory</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learns best when images, maps and graphics are incorporated</td>
<td>Learns best when new listening and speaking either lectures or group discussions</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Read &amp; Write</th>
<th>Kinesthetic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Learns best through words, enjoys reading and writing copious notes.</td>
<td>Learns best in a hands-on type environment, must complete tasks to retain information</td>
</tr>
</tbody>
</table>
Effective Training Methods

Develop training with the end in mind.

- Identify outcome
- Provide need-to-know information
- Collaborate to validate functionality
Design Training to Audience
Too much or very detailed information puts your audience to sleep!
Contracts

All contracts entered into the name of Georgia Tech are subject to the Policies and Procedures of the State Board of Regents.

*Georgia Tech’s legal name* is “The Board of Regents of the University System of Georgia by and on behalf of the Georgia Institute of Technology.”

A *contract* is any document that creates an obligation, right or liability

- Only *authorized persons* may sign contracts
Create Tools to Confirm Understanding

PURCHASING POLICIES AND PROCEDURES TRAINING

1. Where will you find laws, rules and regulations related to purchasing?
   a. Georgia Procurement Manual (GPM)
   b. University System of Georgia Purchasing Policy
   c. Georgia Tech Procurement Policies
   d. Federal Acquisition Regulations and Office of Management and Budgets (when applicable)
   e. All of the above

2. What is Georgia Tech’s legal name?

   The Board of Regents of the University System of Georgia by and on behalf of ________________
   ________________ of ________________

3. Only ________________ may sign contracts on behalf of Georgia Tech.

4. All purchases made in BuzzMart must be sent to Georgia Tech locations.
   a. True
   b. False

5. Georgia Tech is allowed to purchase gift cards as gifts, awards and rewards for employees who go above and beyond at work?
   a. True
   b. False

6. Gift cards may be purchased for research participants who participate in sponsored research and students to participate in surveys or activities.
   a. True
   b. False
Click a Concur task to review the required steps.
Questions
Thank you!