REVOLUTIONIZING RESEARCH PROCUREMENT: INNOVATING HIGHER EDUCATION PROCUREMENT ORGANIZATION AND PROCESSES

TTU PROCUREMENT SERVICES



INTRODUCTION

JENNIFER ADLING

ASSISTANT VICE PRESIDENT & CHIEF PROCUREMENT OFFICER



LAUREN BARTA

PROJECT MANAGER





BEING A PARTNER TO THE RESEARCH COMMUNITY

- 1. <u>Provide exceptional support</u> and customer service.
- 2. Anticipate needs
- 3. Engage with researchers and administrative staff
- 4. Vendor engagement

TTU's Story

- 1.Research Expenditures
 - 1. Total Research Salaries \$137.83 million
 - 2. New NSF Grant
 - 3. One Health
- 2.Texas University Fund
 - 1.FY 2025 \$42 million
 - 2. Procurement involved in the TUF approval process
 - 3.TUF Fund Guidelines



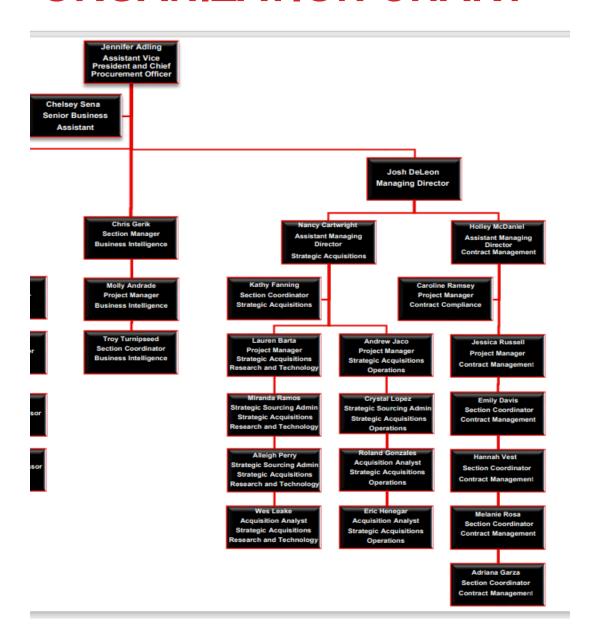
PROVIDE EXCEPTIONAL CUSTOMER SUPPORT

Exceptional Customer Support

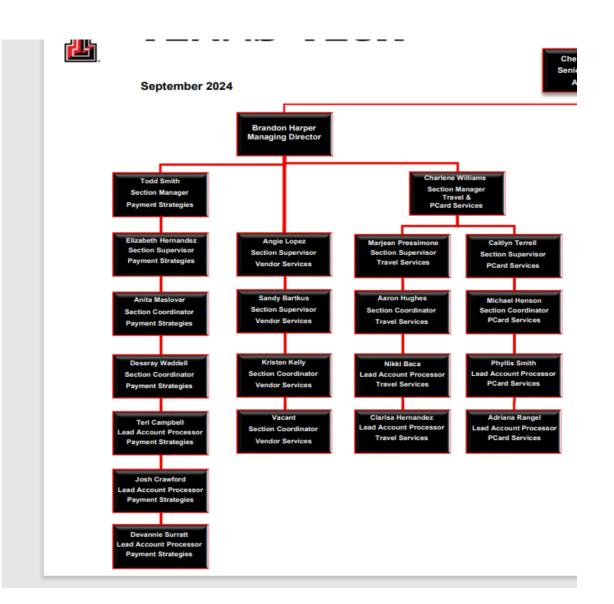
- 1.Prioritize Research
- 2.Increase Staffing/Reorganize the Department
- 3. Improve the Flow Between Processes
- 4. Dedicated Support Teams
- 5. Research Council
- 6.Improve Training
 - a) Vendor Training
 - b) Departmental Training
 - c) Red Raider Acquisition Academy
 - d) Develop Research Centric Materials and Classes (start-up funds)
 - e) A&F Certification
 - f) Red Raider Research University (procurement module)



ORGANIZATION CHART



ORGANIZATION CHART

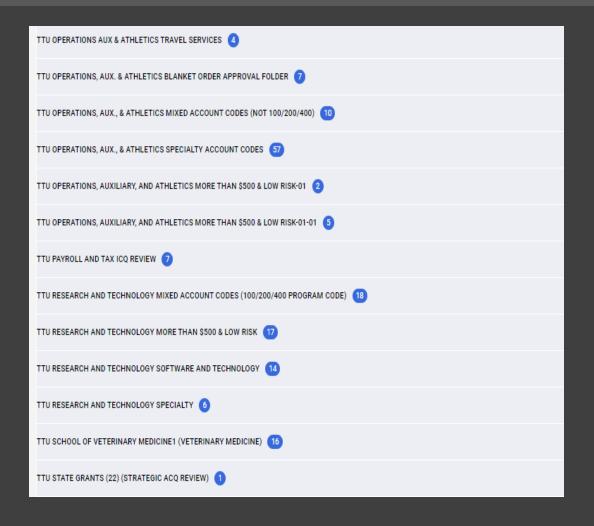


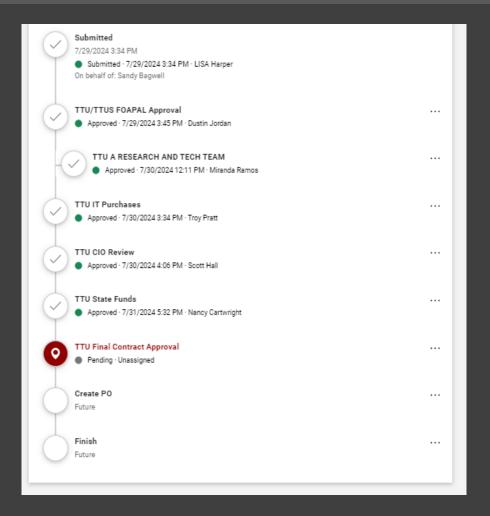
REORGANIZING THE DEPARTMENT

TTU reorganized the Strategic Acquisitions department to provide a focus for research support.

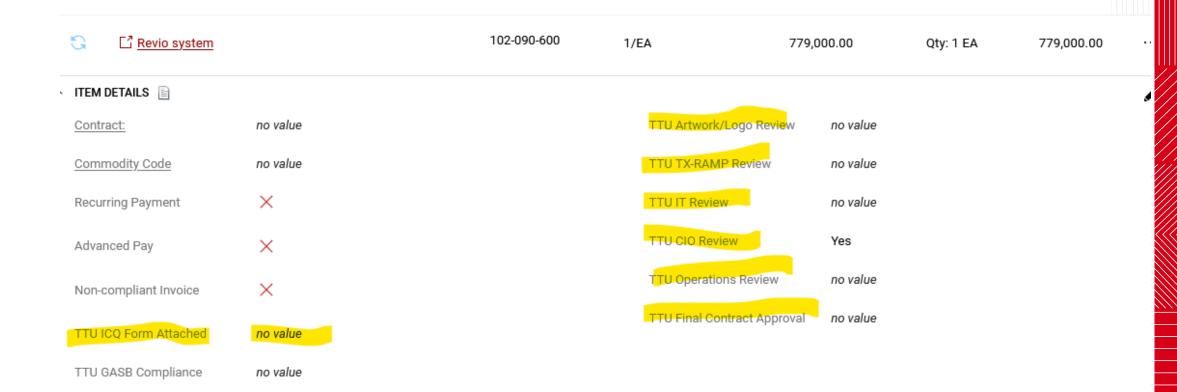
- 1.Research and Technology Team
- 2. Operations, Auxiliaries, & Athletics Team
- 3. Transactions are now grouped for review.
- 4. Cleaned up duplicative workflows.
- 5. Toggle functionality.

REWORK JAGGAER WORKFLOWS





TOGGLE FUNCTIONALITY



ANTICIPATING NEEDS

- 1. Texas University Funds Approval Process
- 2. Engage with the Research Community
- 3. Research Process Improvement Committee (not just Procurement)
- 4. Scientific Goods and Services RFP
 - a) Data Analytics
 - b) E&I RFP
 - c) UT Alliance
 - d) E&I Cooperative
- 5. Train Staff on Research (interact with researchers and field trips to the labs)
- 6. Engage with Other Departments
 - a) Animal Care
 - b) Vice President for Research
 - c) Environmental Health and Safety
 - d) Information Technology
 - e) Operations

VENDOR ENGAGEMENT

- 1. Annual Vendor Fair/Scientific Vendor Fair
- 2. Annual Vendor Meetings (over \$250,000 annually)
- 3. New Vendor Training Class
- 4. TEAMS Channel
- 5. Newsletter
- 6. Discuss Procurement Strategy
- 7. Negotiate Value-Ads

CONTRACT RESOURCE PAGE







CAR@LINA®

Vendor Name: Bio-Rad Laboratories Inc

Vendor Name: Carolina Biological Supply Company



















FOREIGN IMPORT PROCESS

Foreign Import Worksheet

- Process and workflows that help expedite the review process
- Coordination between broker and vendor from the start
- Help provide information upfront to help coordinate any certifications or additional approvals that are needed.

FROM HERE, IT'S POSSIBLE.

Finance and Administration



Vendor Import Shipping Information

Vendor Name	Vendor Contact
Vendor Contact Email	_Vendor Contact Phone Number
Complete address items will be shipped from:	
Item Being PurchasedNumber of Boxes Provide the exact HTS Code for each item	
Dimensions (including metrics) (L x W x H and weight) for each box.	•
LWH	Weight
Does this shipment contain chemicals? Yes No <u>If ye</u>	s, please attach the SDS sheet for each chemical.
Does this shipment require specific accommodations during transit? (Re	egulated temperature, handle with care, etc.)
The TTU ordering depart	ment is responsible for all

shipment duties and fees for imported goods and equipment.

- Frayer Logistics Corp holds the Power of Attorney (PoA) for TTU to handle all customs clearance and duties.
- Pegasus Logistics Group is TTU's designated freight forwarding company. All shipments MUST be arranged and handled by Pegasus.
- Commercial Invoice Requirements -Term of Sale/INCOTERM
- - -HTS Classification Code
 - -Country of Origin
 - -Manufacturer if not the Seller

For any questions or concerns regarding this form, please contact strategic.acquisitions@ttu.edu

CUSTOMS BROKER AND FREIGHT FORWARDER

- Monthly Meetings
 - Upcoming shipments
 - Issues with pending shipments
- Weekly report on pending shipments distributed twice a week (example on next slide).
- Group email for all orders, questions, and update requests just for the TTU account team.

Shipment Listing Report



PEGASUS LOGISTICS GROUP

306 Airline Drive Suite 100 Dallas, TX 75019 T: +1 469.671.0300 F: +1 469.671.0314 http://www.pegasuslogistics.com

SOLUTIONS THAT DELIVER RESULTS

Shipment Listing Report - TEXAS TECH UNIVERSITY/TEXAS TECH UNIVERSITY SYSTEM (TEXTER

Report Shipments where Client is: Consignor, Consignee, Freight Direction: ALL

Delivery Status: No Actual Delivery Date,

Shipment Listing Report Printed by: Elizabeth Eldredge 05-Sep-24 12:05 AM

Shipment	Trans	Order Ref	Consignor Name	Origin	Delivery Address	UQ	Weight	UQ	Pickup By	Pickup Act
S00261555	SEA	P1127441	3D WASP	ΠΖUP	1204 BOSTON AVE RM 117	SKD	0.00	KG		
S00267685	COU	P1145906, PO#:	VETEDUCATORS GMBH	DEBER	7671 EVANS DRIVE	BOX	18.00	KG		
S00268225	COU	P1149473	INTERNATIONAL POINT OF CARE / ANAL	CAETC	3204 MAIN ST	BOX	15.00	KG		
S00268748	COU	PO#P1149979	LASER COMPONENTS GERMANY GMBH	DEOLC	7671 EVANS DRIVE	BOX	10.30	KG		
S00268822	COU	24899, EM	CERN	CHMEY	1204 BOSTON AVE RM 117	PKG	18.60	LB	29-Aug-24	29-Aug-24
S00269173	COU	#P1154022, PO	VETERINARY SIMULATOR INDUSTRIES II	DEBER	7671 EVANS DRIVE	CRT	135.00	KG		
S00269212	SEA	P1135334, PO#	VETEDUCATORS GMBH	DEBER	7671 EVANS DRIVE	BOX	15.00	KG		

Vendor Rankings							
	Summary	Ranking by Evaluator/Round	Vendor	Sheet Name	rimary		
279.7		Sum 5			Total		
76.9		Sum 1			Vendor Vendor 1		
76.9		1	Vendor 1	Evaluation	1-Vendor 1-First		
115.0		Sum 3			Vendor Vendor 2		
55.7		2	Vendor 2	Evaluation	1-Vendor 2-First		
59.3		1	Vendor 2	Evaluation	2-Vendor 2-Third		

TECHNOLOGY IMPROVEMENTS

TECHNOLOGY IMPROVEMENTS

- Technology Workflow in Jaggaer
- Information Technology Review of Business Contracts
- Technology/Procurement Monthly Meeting
- Intended Use of Technology Form
- IT Contract Addendum
- Restricting Software on PCard
- Operations Reviewing Equipment (capacity, ventilation, loading dock, size)

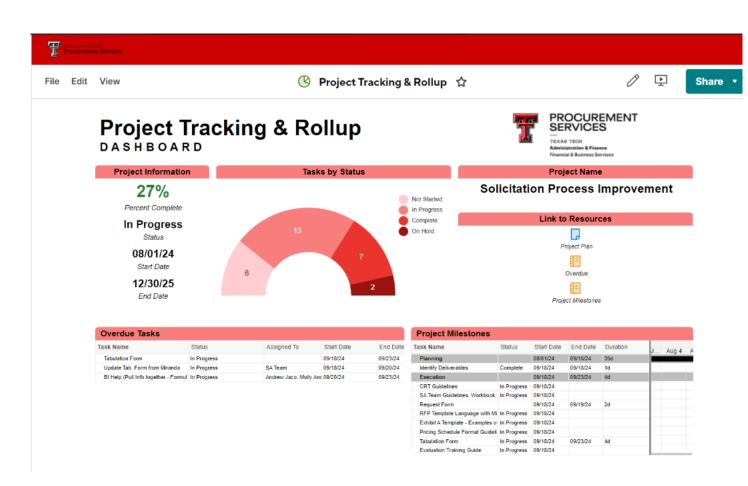
4)	Does the software or system integrate into any other TTU/TTUS software or systems (Banner, Blackboard, Salesforce, or any integrated single-sign (SSO) feature)?	Yes	No No				
5)	Does the equipment or software include a cloud computing service? Keywords include (but not limited to): Cloud Computing; Software-as-a-Service (SaaS); Platform-as-a-Service (PaaS); Infrastructure-as-a-Service (IaaS); On-demand Self Service; Broad Network Access; Resource Pooling; Rapid Elasticity; Measured Service; File Sharing + Data Storage	Yes	☐ No				
6)	What type of data will be created, uploaded, processed, or stored using the equipment or software	Check all that ap	oply)				
	This software or equipment does not create, receive, process, or store data.						
	Personally Identifiable Information ⁱ (PII) (including, but not limited to, email address, name, date of birth, or social securit number)						
	Public Health Information ⁱⁱ (PHI) (including physical records, or spoken information)						
	Financial information (including, but not limited to, credit card numbers, bank routing numbers)	ers, etc.)					
	Student information (including, but not limited to, student records, grades, email addresses, e	tc.)					
	Other (research data, survey answers, etc.):						

ARTIFICIAL INTELLIGENCE CLAUSE

Use of Artificial Intelligence ("AI"). Contractor hereby represents and warrants that:

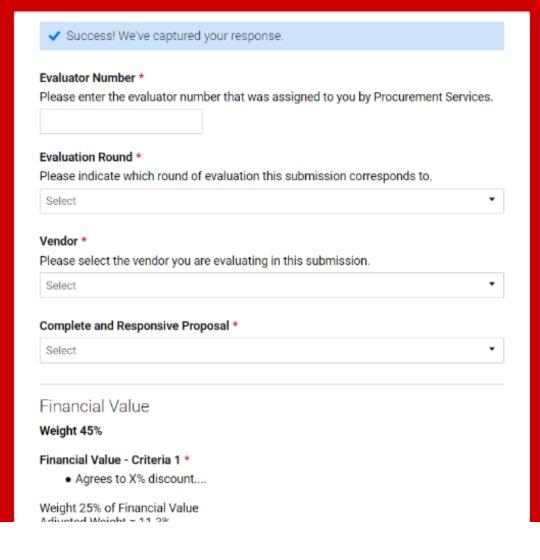
- (i) Artificial Intelligence ("AI") includes machine learning, natural language processing ("NLP"), robotic process automation ("RPA"), computer vision, robotics, expert systems, or any other forms of AI.
- (ii) Contractor will promptly provide TTU written disclosure of any current or contemplated use of AI throughout the course of the Agreement with the parties.
- (iii) Contractor will cooperate with TTU to ensure the provision, use, and storage of TTU data complies with all laws and regulations, including those pertaining to data privacy and security.
- (iv) Contractor will not use TTU data and any AI output resulting from TTU data for any other purpose than to fulfill Contractor's obligations under this Agreement.
- (v) While any information obtained from and related to TTU is in the possession or control of Contractor, Contractor will implement and maintain physical, administrative, and technical safeguards to protect the information from inadvertent or unauthorized access, disclosure, use, or modification, taking into the account the sensitivity and confidentiality of such information. Contractor further warrants and represents that it has and will continue to comply with all applicable data protection laws and regulations with respect to the AI system and any data that is collected or processed.
- (vi) Contractor maintains, and shall continue to maintain, commercially reasonable and industry standard conforming security safeguards and controls, including proper access controls for the AI. To the best of Contractor's knowledge, there has been no unauthorized use of or access to AI and no AI has been used in violation of any applicable laws and regulations.
- (vii) Contractor's current or contemplated use of the AI does not, and will not, infringe upon or violate any intellectual property rights, rights of likeness or publicity, or any other third-party right of any kind.
- (viii) Contractor maintains and shall continue to maintain commercially reasonable insurance coverage for claims or losses pertaining to the AI. Contractor warrants that the AI has not been subject to any claims, suits, demands, rulings, judgements, threats, fines, penalties, or a cease-and-desist letter asserted against, or brought by, Contractor pertaining to intellectual property or any other rights violation or breach of any applicable law, rule, or regulation.

Project Management



Utilizing SmartSheets

Evaluation Form



PROCUREMENT IMPROVEMENTS

PROCUREMENT IMPROVEMENTS

- Increase Contract Portfolio (RFPs and Cooperatives)
- 2. Increase Micro Threshold
- 3. Federal Cost Justification
- 4. Solicitation Process Management



FEDERAL COST JUSTIFICATION



Administration & Finance Financial & Business Services

FEDERAL FUNDS - COST JUSTIFICATION WORKSHEET

GENERAL INFORMATION / TTU PROCUREMENT SERVICES CONTACT								
Contact Name:		Contact Email:						
Requisition #:		Contact Phone:						

SUPPLIER INFORMATION							
Supplier Name:							
Contact Name:							
Phone:							
Email Address:							

Cost Justification based on:

Cost justification is required for any purchase using federal funds that is greater than \$250,000. If only one quote has been obtained, TTU must provide additional information documenting how the price quoted by the selected supplier was determined to be fair and reasonable.

Check One:

Published Catalog/Online Price:

- · Attach applicable supplier catalog or online page(s) showing pricing for the requested items or service.
- Is the price quoted by the supplier as good as or better than the catalog or online price? If "no," provide an
 explanation about why it is not.
- If the price quoted by the supplier matches their catalog or online price, the supplier must still be contacted to confirm that the price quoted is their best offer. Document supplier name and contact date.

Established Market Price:

- Attach a price list or quote for a similar item or service from a competing supplier, or attach a copy of a supplier invoice to, or a purchase order from, another organization.
- Explain the similarity of the items.





TTU Procurement Services - Solicitation Dashboard

Open Solicitations

4

Solicitations Under Evaluation

9

Queued Solicitations

35

Recently Awarded Vendors

13

Total Solicitations

48

Key Contacts

To streamline our communication and ensure prompt responses, we have updated our contact information

Contact:

solicitations.purchasing@ttu.edu

Using this email will help us manage your queries more efficiently and ensure that you receive the assistance you need in a timely manner.

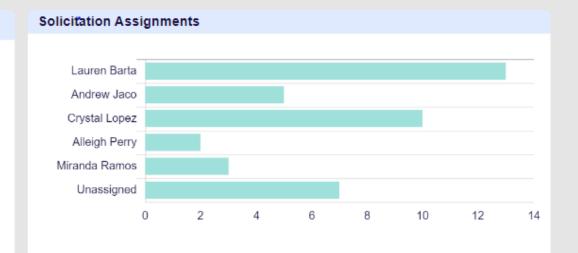
Thank you!

News

Procurement Services will be closed on Monday, 9/02/24. Please submit all pending items to the Solicitation team by 8/30/24 to ensure the assigned Sourcing Administrator has up-to-date information needed for the purchase solicitation.

Help us help you!

Please provide us with feedback on this dashboard! Please e-mail strategic.aquisitions@ttu.edu for ways that we can help improve your experience and facilitate communications to you.



SOLICITATION PROCESS IMPROVEMENTS

		PROPOSAL E	VALUATI	ON WO	RKBOOK			
Date Initiated:					E	VALUATION TEAM		
Date Completed:							Voting	Advisorv
Solicitation Number:				Name	Position	Contact Email	Member	Member
Contract Specialist:								
HOW	TO USE THIS WORKBO							
Finalize Evaluation Team	Begin the process by compiling eva Consider including staff from acros procurement, college, finance, and evaluation team minimizes conflicts commit the required hours to read, proposals. Team members must sign agreement.	s TTU, such as legal divisions. Ensure the of interest and can score, and discuss						
Prepare Workbook	Before RFP release, work with the scope of work, evaluation criteria, Populate the scorecard with these and list minimum requirements for e rubric for evaluators.	and proposal questions. inputs, weight criteria,						
Hold Evaluator Orientation	After proposals are received, bring an evaluator orientation. Summarize	-		Complete?		Task		
	requirements set out by the RFP. D	iscuss the scoring			Finalize evaluation tea	am and sign confidentiality a	igreements	
process, and walk through how to populate scorecard. At the end of your orientation, distribute each evaluator's copy				Download submitted	proposals after RFP closure	•		
	of the scorecard.				Check vendor complia	ance with required provision	ns	
Individual Scoring	Working with your evaluation team, individual scoring period should be.				Hold evaluator orienta	ation meeting		
	hour or more to fully read and score	e. During this period,			Distribute individual s	coring sheets and scoring in	nstructions	
	evaluators should not discuss prop				Collect completed sco	oring sheets		

EVALUATION SCORECARD

(RFP NAME AND NUMBER)

	Weighting	Adjusted Weighting	Max Score	Vendor 1	Vendor 2	Vendor 3
Complete and Responsive Proposal	Pass / Fail	Pass / Fail	Pass	Pass	Pass	Pass
The Proposer provides a complete submittal that is inclusive of all required information and responsive to the requirements of the RFP.				Pass	Pass	Pass
Financial Value - Financial costs and/or benefits to the University	45%	45.0%	90.00	83.25	90.00	49.50
Costs of goods and/or services	25%	11.3%	22.50	Good	Excellent	Good
Cost of ongoing maintenance, service agreements, licenses, or support	25%	11.3%	22.50	Excellent	Excellent	Poor
Warranty	25%	11.3%	22.50	Excellent	Excellent	Excellent
Sponsorships/scholarships/non-monetary contributions contributed by the Proposer	25%	11.3%	22.50	Excellent	Excellent	Poor
Demonstrated ability of the Proposer to fulfill TTU's requirements in accordance with the specifications	55%	55.0%	110.00	102.3	96.25	65.725
a) Value added Options	30%	16.5%	33.00	Excellent	Excellent	Fair
b) Experience Proposer's demonstrated professional experience Experience with institutions of higher education Stability and success of the Proposer's business including but not limited to qualifications of key personnel, past performance on similar projects, length of time the business has been operational, pending or past legal proceedings, and demonstrated capability and financial resources to perform services	25%	13.8%	27.50	Very Good	Fair	Fair
 c) Compliance IT requirements, including accessibility, security, integration and TX Ramp requirements Ability to comply with Texas Laws 	15%	8.3%	16,50	Excellent	Excellent	Very Good
d)Quality assurance Plan and control measures implemented and maintained by Proposer Methodology for performing services and project planning Customer service plan	15%	8.3%	16.50	Good	Excellent	Excellent
e) Quality, availability, and adaptability of Proposer's supplies, materials, and equipment	15%	8.3%	16.50	Excellent	Excellent	Poor
HUB Compliance	Pass / Fail	Pass / Fail	Pass	Pass	Fail	Pass
				Pass	Fail	Pass
Total Score	100%	100%	200	185.55	0.00	115.23



EVALUATION GUIDE

(RFP NAME AND NUMBER)

Evaluation Scale

Excellent (100%)

The Proposal demonstrates an extremely robust and comprehensive understanding of the stated requirements/objectives. The Proposal reflects a combination of strengths demonstrating that the overall requirements may be exceeded in a very beneficial way to TTU. The Proposal has no weaknesses or deficiencies. Risk of unsuccessful performance is extremely low.

Very Good (90%)

The Proposal demonstrates a very robust and comprehensive understanding of the stated requirements/objectives. The Proposal reflects a combination of strengths demonstrating that the overall requirements may be exceeded in a beneficial way to TTU. The Proposal has no deficiencies. Weaknesses, if any, are of very minor impact and are easily correctable. Risk of unsuccessful performance is very low.

Good (70%)

The Proposal demonstrates a robust and comprehensive understanding of the stated requirements/objectives. The Proposal has strengths that will benefit TTU. The Proposal has no deficiencies but has some weaknesses that are of limited impact and correctable. Risk of unsuccessful performance is low.

Fair (50%)

The Proposal demonstrates an understanding of the stated requirements/objectives. Proposal meets all requirements and provides an acceptable level of quality and qualifications. A Fair rating corresponds to a Proposer merely meeting the minimum Proposal standards. The Proposal has no deficiencies. Weaknesses are correctable. Risk of unsuccessful performance is moderate...

Poor (25%)

The Proosal fails to demonstrate a clear understanding of the stated objectives/requirements. The Proposition of the CRT. Risk of unsuccessful performance is high.

No Points (0%)

The Proposal is incomplete or does not demonstrate the requirements or preferences outlined in the eval

Score Card

		Offeror 1	Offorer 2	Offeror 3	Offorer 4
Respondent Expe	rience	Fair (50%)	Good (75%)	Very Good (90%)	Very Good (90%)
		Explanation	Explanation	Explanation	Explanation
		1)	1)	1)	1)
Character	مداء ۔	2)	2)	2)	2)
Streng	gtns	3)	3)	3)	3)
		Explanation	Explanation	Explanation	Explanation
		1)	1)	1)	1)
\A/ I		2)	2)	2)	2)
Weakne	esses	3)	3)	3)	3)

Jennifer.adling@ttu.edu

Lauren.barta@ttu.edu



THANK YOU!