

**Department/Unit: Contract Services**

**Year: 2018**

**Contact Name: Lindsay Ramage**

**Contact Title: Assoc. Director of Contract Services**

**Unit Overview/Mission/Purpose**

Contract Services supports the University mission by building internal and external business partnerships. In addition, it also supports fiscal stewardship by keeping the University's contracts compliant with the Ohio Constitution and the Ohio Revised Code, mitigating risk and exposure to the University and ensuring contracts are compliant with University policies.

**Staffing**

	FY16	FY17	FY18	FY19
# Full Time Staff	2	2	2	2
# Student Employee FTE	.5	.5	.5	0

\*One of the full time staff works on contracts. The other is a Strategic Sourcing Analyst 50% and a Buyer 50% of the time.

\*\*Shared a Student with Business Services.

**Success Outcome 1:**

To negotiate with suppliers quickly and keep the University legally compliant. Provide excellent customer service with end users.

**KPI 1.1- Contract Services- Number of agreements, renewals, terms and conditions reviewed/signed**

**Data:** The data will be tracked in a spreadsheet and broken out by the type of contract that is coming through Contract Services, with the intent to get benchmark data from other Ohio four year schools.

**Result:**

From August 23, 2018 to October 31, 2018 the following table shows the type and the number of agreements that came through Contract Services that did not need to go to General Counsel:

Type of Agreement	Count of Number
Contract	67
Date Offer	1
Engagement letter	1
Event Agreement	3
Facility Use Agreement	58
Field Rental Agreement	14
Game Agreement	30
Hotel Agreement	24
Independent Contractor Agreement	7
Renewal	20
Speaker/Artist	17
Sponsorship Agreement	12
Suite Agreement	8
Terms & Conditions	12
Wright1card Agreement	2
<b>Grand Total</b>	<b>276</b>

Contract Services reached out to peers at the other Ohio four year schools to see if they are tracking the amount and type of agreements they get during a certain time period to use for benchmark data, however as shown below none of the schools track this data.

**Q: For those schools that send contracts to their General Counsel or have signature authority for your template contracts can you please provide me the following:**

1. What is the title of the person/persons that does this?
2. Do you track how many, the types that come through (contract, renewal, terms & conditions, game agreement, etc.) and the cycle time?

If your school has a different process or doesn't do this, can you please respond with that as well?

**Kent State**

1. Associate Counsel
2. While we do not formally track this activity, we could through use of the Total Contract Module in Jaggear if required.

**University Of Cincinnati**

1. We have an information system that is used for routing. All contracts-whether for Purchasing or for any other purpose...only about a third of UC contracts are purchasing related...are sent from the system to General Counsel for execution by one of our attorneys. There is one staffer in Counsel that gives them a quick look and routes to specific attorneys.
2. Heck no 😊 We track the time through our office for our work, but Counsel is seen as slow by many. Since they don't report to us we don't track it. We enjoy a close and pleasant relationship with Counsel and they are very responsive when we ask for something to be expedited.

Our Counsel delegates signature authority to many areas for different things that are done on templates Counsel creates.

**University of Akron**

1. Director of Purchasing – I do this as part of my duties
2. No – I would like to in the future, but our process is not automated, so it would have to be a manual count. At the time, no one has requested this information.

**Youngstown State University**

1. For contracts that are non-standard (contracts that are done on the vendor's contract format), these are reviewed first by Procurement and then by General Counsel. The title of the person is Associate General Counsel. For standard contracts (YSU contract templates), review by General Counsel is not required and only Procurement will review.
2. We do not formally track number, type or cycle time on contracts.

**University of Toledo**

1. Legal has approved the use of several 'templates'. As long as modifications are minimal and to none of the 'legal' conditions, they purchasing is free to move without legal review and I sign all purchasing agreements up to \$250K and then our AVP/VP over that. All other agreements (on vendor paper) must go through the legal process.
2. We have just developed a submission website that we are getting ready to roll out, that will finally be able to capture turn around time as it will be time stamped when we get the documents and then we can track through to final signature. If we are good about getting all our agreements in Determine (our contract management platform), I can run reports to understand types and number of agreements we manage.

**Response/Action Plan:**

Contract Services will continue to track the type and amount of contracts coming through the office. As well as starting with data in November 2018, cycle times will be calculated as well.

**KPI 1.2- Contract Services- Length of Contract Review Lifecycle for Goods and Services**

**Data:** The data will be tracked on a spreadsheet with the following headers to determine how long contracts take to go through the process. This will also show us cycle times for each area such as Contract Services, General Counsel or even the Supplier.

Supplier	Dept	Date Contract Dept received	Date Sent to GC	Date Received from GC	Date Sent to Supplier or Department	Date Received back from Supplier	Followed Up	Notes
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**Result:**

From July 1, 2018 to October 31, 2018 there were 11 contracts and 9 quotes with terms conditions that were reviewed and completed during this time period.

Process Flow	Average Days
Contract Department to General Counsel	3
General Counsel to Contract Department	15
Contract Department to Supplier	2
Supplier to Contract Department	5
Waiting on requisition or countersigned agreement	2
Full Contract lifecycle	28
Reviewed but dept cancelled	1
Shorested Processing Time	5 days
Longest Processing Time	52 days

**Response/Action Plan:**

A 28 day lifecycle of receiving a contract, reviewing a contract, to getting a contract signed seems to be a reasonable timeframe. This metric will be tracked over time as well as against peer institutions to assess progress and opportunities for improvement.

**KPI 1.3- Contract Services- Customer Satisfaction Survey**

**Data:** This will be an annual survey using Qualtrics to get a better understanding of how Contract Services is doing from a Customer Service standpoint and what we might be able to improve on.

**Result:** Not completed

**Response/Action Plan:** Contract Services will be included in a department (Controller) wide satisfaction survey.

**KPI 1.4- Strategic Sourcing- Review Rogue Spending**

**Data:** The data will be from p-card data (JP Morgan Chase) on a monthly basis and analyzed to determine how much was spent on goods and services from suppliers other than those with the University contracts for those goods and services (Rogue Spend). This will also result in determining the departments we will need to work with to direct them to a contract. Specific

data points should include commodity, non-contract supplier, number of purchases, dollar amount and department.

**Response/Action Plan:** Now that we have our Rogue spend determination, we will sort by department, create a spreadsheet for each Business Manager and work through them to educate the contracts we have in place for these type of purchases.

We will continue to pull the p-card data each month and follow the same philosophy as described above as we continue to work with the departments and educate the campus community.