

## York University

In 2007, Procurement Services at York University continued to track to its strategic plan by focusing on three major goals: “e”-nableness; compliance, and supplier relationships. These goals are embedded in the revised Procurement Policy and Guidelines which were approved by the Board of Governors in the summer of 2007. In addition, the revised Procurement Policy reflects the University’s commitment to promoting the values of sustainability and social responsibility.

Automating the order-to-pay process to the extent possible continues to be a significant objective for Procurement Services. The use of electronic invoicing has increased dramatically during 2007 and this effort was made possible with the support of General Accounting in the Finance department. The community’s use of the PCard has also increased during 2007 thus allowing staff in Procurement Services to focus on high value acquisitions, particularly as they relate to the ever increasing research portfolio. A CFI audit conducted in 2007 resulted in a relatively high passing grade although it emphasized the need for continued documentation vigilance. With the increase of research purchases, the topic of prepayments has been brought to the foreground more frequently and, as such, it was appropriate to highlight the controls and process that surround it.

With the release of the provincial Auditor General’s Report, Procurement Services has undertaken a formal approach to assessing our work as it relates to the principles of “economy, efficiency and effectiveness”. To this end, the department is continually monitoring all the programs for which it is responsible so as to ensure that every activity is performed keeping these principles in mind. In particular, staff has taken care to identify long service suppliers with a view to confirm fair market value in the goods and services provided to the University. A number of these have resulted in a more formal contractual relationship with measurable terms and conditions including pricing points.

To ensure this level of compliance Procurement Services in consultation with Legal Services, revamped the main and most used competitive bidding documents: The Request for Proposal, Tender and Quotation. The goal of the revisions was to update and include current legislation and policy items and ensure consistency and flow within and between the documents. The revised documents were implemented by staff in early 2008. Also scheduled for review is the CCDC 2 document which is used primarily for our construction projects.

Procurement has been very involved in supporting the University's goal of advancing faculty and staff understanding of business processes. To this end, Procurement Services and the Office of the Comptroller held two Procure-To-Pay sessions which focused on the main functions of buying and paying for institutional acquisitions. In support of the

University Academic Plan, Procurement Services, Research Accounting and The Office of Research Services offered information sessions for all faculty and researchers in receipt of funding from external granting agencies. These sessions communicated the many services offered by these University departments which are specifically tailored toward successful applications and award compliance.

A notable highlight in 2007 was York University's hosting of the annual OUPMA spring conference. The theme was "Procurement: A Day in the Life..." the focus of which was to highlight the value of procurement professionals to the institution they serve. The unique features of the University's campus were used as the backdrop for the presentations as well as the networking activities. The Schulich School of Business Executive Learning Centre hosted the workshops, while Historic Black Creek Pioneer Village and the University's Observatory were chosen as sites for evening networking. Topics and presentations included: a welcome to the group by Vice-President (Finance and Administration) Gary Brewer; McCarthy Tétrault (external counsel to the University) presented recent information with respect to Procurement law; and Bob Moore (now retired Director of Purchasing at the University of Western Ontario) presented on the much needed balance between culture and leadership in both work and in life. Trudy Pound-Curtis (AVP Finance and CFO) closed the conference by addressing the importance and value of Procurement in the University setting. York University continues to follow the developments as they relate to the Ontario Education Collaborative Marketplace (OECM) whose major goals are to provide a common electronic marketplace; and facilitate on-going collaborative sourcing initiatives. York University remains committed to these principles as they relate to the value add activities OECM will bring to the operations of the University.

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