



Toolkit for Building **Strategic** **Procurement** Capabilities

Business Affairs
Forum





Who Should Read

Chief Procurement Officers
Strategic Sourcing Managers
Chief Business Officers

Toolkit for Building **Strategic Procurement** Capabilities

4 Ways to Use This Toolkit

- Redesign procurement processes, systems, and reporting to improve efficiencies and create staff capacity for strategic analysis
- Create new strategic sourcing roles and hire staff with critical professional competencies and analytical skills
- Mitigate IT risks from technology contracts and technology-embedded commodities
- Improve policy and process communications with internal customers

Business Affairs Forum

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Table of Contents

Executive Summary 4

Section 1: Process Automation and Redesign Tools 7

 Tool 1: Process Improvement Prioritization Matrix 8

Section 2: Data and Metrics Optimization Tools 13

 Tool 2: Selecting Core Performance Metrics Guidebook 14

Section 3: Staffing and Organizational Development Tools 21

 Tool 3: Compendium of Strategic Position Descriptions 22

Strategic Sourcing Manager 24

Strategic Buyer. 29

Data Analyst 36

Contract Manager 40

Relationship Manager 42

 Tool 4: Dedicated IT Contract Reviewer Toolkit 44

 Tool 5: Guide to Conducting Behavioral-Based Interviews 51

Section 4: Customer Communication Tools 67

 Tool 6: Website Navigability and Comprehensiveness Audit 68

Executive Summary

Financial Pressures Driving Need for More Strategic Procurement Functions

In an era of constrained budgets, higher education procurement leaders—and executive leaders more broadly—realize they need to more closely examine purchasing and payables processes. Most obviously, they are seeking sustainable cost savings through more strategic approaches to procuring goods and services. At the same time, they recognize that technological innovations have unleashed new opportunities to improve operating efficiencies—further reducing administrative costs while also improving vendor and customer satisfaction. Some common strategic goals for higher education procurement units are listed below.

Strategic Goals for Higher Education Procurement Units

- 1 Leverage spend data to consolidate and renegotiate vendor contracts
- 2 Identify and negotiate new strategic vendor partnerships
- 3 Revise policies to increase compliance and maximize cost savings
- 4 Educate campus on procurement policies and support services to increase on-contract spend

Transforming Core Processes and Structures to Expand Strategic Capabilities

However, many procurement leaders struggle to execute on these strategic goals. Most units have historically been staffed and organized to support reactive, transactional purchasing activities (such as processing purchase requisitions and invoices). As such, they often struggle to perform more strategic tasks like spend analytics and competitive contract negotiation and management.

In response, procurement leaders are pursuing foundational organizational changes to expand their units' capabilities. These changes span four focus areas, outlined below.

Four Areas of Focus for Strategic Procurement Transformations



Process Automation and Redesign

Expand staff capacity for more strategic activities and improve service levels

Data and Metrics

Collect, monitor, and act on core performance metrics to advance strategic goals



Staff and Organizational Development

Create new roles and hire staff with elevated skillsets to expand strategic analysis, negotiation, communication, and risk management capabilities

Customer Communication

Clearly communicate procurement policies and processes to internal customers to get buy-in for necessary changes



Source: EAB interviews and analysis.

Executive Summary (cont.)

Resources to Expand Procurement Units' Strategic Capabilities

This toolkit is designed to help procurement leaders execute on these opportunities to transform their units, with one set of resources for each focus area:

- Section 1 features a **process improvement prioritization matrix** to help leaders sequence automation and process redesign initiatives and, in turn, create foundational staff capacity for new strategic activities.
- The resource in Section 2 provides a **starter list of core performance metrics** leaders can monitor, as well as a **step-by-step guide to selecting the metrics** that best reflect unit-specific goals.
- The tools in Section 3 support staffing initiatives. Specifically, the first tool in this section is a **compendium of strategic position descriptions** for roles recently created in higher education procurement functions. The second tool in Section 3 provides in-depth **guidance on how to create dedicated IT contract reviewer roles** that mitigate the security risks created by increasing technology-connected purchases on campus. The final tool in Section 3 is a **behavior-based interviewing toolkit**, designed to help leaders screen for increasingly important professional competencies (e.g., communication, critical thinking) in hiring processes.
- Section 4 addresses internal customer communications. It features a **website navigability and comprehensiveness audit** to help leaders ensure their policies and processes are documented online in a customer-centric manner.

Summary of Tools in This Resource

Section	Tool	Description
Section 1: Process Automation and Redesign Tools	Tool 1: Process Improvement Prioritization Matrix (p.#7)	Provides a framework for ranking and sequencing process improvement initiatives—including investments in automation solutions
Section 2: Data and Metrics Optimization Tools	Tool 2: Selecting Core Performance Metrics Guidebook (p.#13)	Outlines considerations for tracking core performance metrics for procurement, accounts payable, and other administrative units—including a comprehensive menu of potential metrics to monitor
Section 3: Staff and Organizational Development Tools	Tool 3: Compendium of Strategic Position Descriptions (p.#20)	Contains eight position descriptions for strategic roles, including sourcing, data analysis, relationship management, and contract management roles
	Tool 4: Dedicated IT Contract Reviewer Toolkit (p.#42)	Offers in-depth guidance for evaluating the need to create full-time, dedicated roles to review technology contracts—plus tools and tactics to mitigate security risks with or without dedicated staff
	Tool 5: Guide to Conducting Behavior-Based Interviews (p.#49)	Provides a framework to evaluate professional competencies in staff interview processes, including a bank of questions to consider asking candidates
Section 4: Customer Communication Tools	Tool 6: Website Navigability and Comprehensiveness Audit (p.#66)	Compiles 10 questions for procurement leaders to answer to self-assess the customer-friendliness of their unit websites

Source: EAB interviews and analysis.



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1

Process Automation and Redesign Tools

- Tool 1: Process Improvement Prioritization Matrix

2

Data and Metrics Optimization Tools

3

Staff and Organizational Development Tools

4

Customer Communication Tools

Tool 1

Process Improvement Prioritization Matrix

Overview

This resource provides a three-step framework for ranking procurement and payables process redesign opportunities.

- **Step 1: Select Variables on Which to Evaluate Processes.** Ensure processes are measured only against those variables representing the most relevant institutional priorities.
- **Step 2: Determine Scoring Scale for Each Variable.** Create a simple numerical scale to score each process against the chosen variables. The definitions of numerical values are respective to each variable.
- **Step 3: Score and Rank Processes.** Evaluate each process according to the variables and add the scores to create a total score. Processes with the highest total scores receive priority when initiating redesign efforts.

Guidance on how to complete each step is included in the subsequent pages.

Goal

Use this tool to sequence investments in automation technology and other process improvement efforts.

Procurement leaders should leverage technology and process redesign to maximize operating efficiencies and create staff capacity for strategic activities. However, leaders oversee a variety of processes that may benefit from technology enhancement or redesign. This tool provides a more systematic way to pinpoint the improvements that will yield the highest returns on investment and determine the ideal order of implementation.

➔ For additional process improvement resources, visit EAB's [Process Improvement Resource Center](#).

➔ Electronically access this tool: eab.com/procurement-toolkit

Prioritizing Processes for Improvement

Step 1: Select Variables on Which to Evaluate Processes

The first step in prioritizing process improvement efforts—including technology enhancements—is to identify the key variables guiding the process improvement efforts in your unit. Leaders should limit the number of variables chosen to ensure that processes are measured only against those representing the most relevant unit and institutional priorities. As such, variables chosen will likely vary across institutions. Below is a sample list of variables to use in evaluating processes. EAB recommends selecting no more than five variables on which to evaluate processes. If you are just beginning process improvement work, we encourage you to prioritize the variable of “time to fix” to deliver some quick wins that can secure support for more long-term efforts.



Timeliness to Fix

What is the expected timeline for process redesign and implementation?



Compliance Risk

Does the process currently comply with institution, state, or federal regulations?



Customer Impact

What impact will redesign have on customer experience and satisfaction?



Expense to Fix

What are the expected costs of the process redesign?



Expense to Continue

What are the expected costs of maintaining the status quo?



Ease of Implementation

How easily can staff amend process steps to make the process less burdensome?



Level of Control

To what degree is improvement dependent on collaboration with external units?



Impact on Efficiency

Does the process consume a significant amount of support staff time?



Organizational Readiness

How prepared are process stakeholders for process redesign?



Strategic Alignment

Is redesigning the identified process critical for meeting larger institutional goals, strategic objectives?

Selected Variables	

Prioritizing Processes for Improvement (cont.)

Step 2: Determine Scoring Scale for Each Selected Variable

Evaluate each variable on a scale of one to three. Although the exact definitions will differ by variable, a score of one should always represent the least ideal scenario for process improvement, and a score of three should represent the most ideal scenario.

Evaluating inefficient processes against redesign variables will often rely on subjective interpretations. Whenever possible, select quantitative variables (e.g., time, cost, etc.) to create a more objective scoring scale. However, this may not be possible in all instances.

Sample Scoring Scale

Variable	1	2	3
Cost of Improvement	High cost	Moderate cost	Low cost
Time to Fix	>6 months	2-6 months	<2 months
Impact on Staff Efficiency	Consumes less than 10% of staff time	Consumes 10-20% of staff time	Consumes more than 20% of staff time
Compliance Risk	Low risk of noncompliance	Moderate risk of noncompliance	High risk of noncompliance
Ease of Implementation	Requires contract with third-party vendor	Requires cross-unit collaboration	Does not require external collaboration

Your Campus's Scoring Scale

Variable	1	2	3

Prioritizing Processes for Improvement (cont.)

Step 3: Score and Rank Processes

The last component is to sum variable scores for each process and rank them by the total score. Higher ratings indicate a process is a strong candidate for process improvement.

Sample Scoring Rubric

Process Name	Cost of Improvement	Time to Fix	Impact on Staff Efficiency	Compliance Risk	Total Score	Rank
Work order submission	1	2	2	1	6	3
Travel and expense reimbursement	2	2	3	1	8	2
New hire verifications	2	1	3	3	9	1

Process Redesign Prioritization Matrix Workbook

Selected Variables							
Process Name						Total Score	Rank



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1

Process Automation and Redesign Tools

2

Data and Metrics Optimization Tools

- Tool 2: Selecting Core Performance Metrics Guidebook

3

Staffing and Organizational Development Tools

4

Customer Communication Tools

Tool 2

Selecting Core Performance Metrics Guidebook

Overview

This guidebook outlines top-of-mind considerations and strategies for identifying core performance metrics for procurement, accounts payable, and other administrative units. It also recommends methods to set principled action triggers that signal underperformance on core metrics.

The tool comprises three parts:

- **Section 1: Compendium of Performance Metrics** that unit leaders can use as a starting list of potential performance indicators.
- **Section 2: Six-Step Filtering Process** to cull a long list of potential performance metrics down to 8-12 core metrics for each unit.
- **Section 3: Guidance on Setting Principled Action Triggers** to compel action on metrics that signal underperformance and mandate corrective action.

Goal

Use this tool to identify the most strategically relevant performance metrics to monitor in your unit.

Procurement leaders have access to an extensive amount of performance data. To effectively leverage this data to drive strategic improvements, they must first select a handful of core metrics that best reflect their specific unit performance goals. This tool provides a starting list of performance metrics to choose from, as well as a filtering process to narrow that list down to those metrics that best evaluate a unit's operational effectiveness.

▶ Electronically access this tool: eab.com/procurement-toolkit

Accounts Payable

Metric Category	Metric
Size and Scale of Operations	Number of bank accounts
	Number of checks issued: a. All b. To students c. Travel-related
	Number of vouchers: a. Students b. Travel c. Vendors
	Total accounts payable (dollars)
Efficiency	Average number of days to reimburse travel expense
	Cost of expense report processing per FTE
	Cost per expense report
	Cost per travel and entertainment reimbursement
	Cost to process an invoice
	Number of days to apply cash
	Number of days to process an invoice
	Number of days until checks issued: a. All b. To students c. Travel-related
	Number of invoices per finance FTE
	Number of invoices per finance FTE per day
	Number of vouchers per FTE
	Percentage of online invoices paid within 30 days of receipt
	Percentage of online invoices paid within 45 days of receipt
Effectiveness	Accounts payable error rate
	Days payable outstanding
	Number of invoices in discrepancy status for more than 30 days
	Percentage of invoices with a discrepancy between original purchase order and actual invoice
	Travel and entertainment expenses error rate

► Electronically access this tool: eab.com/procurement-toolkit

Procurement

Metric Category	Metric
Size and Scale of Operations	Number of certified buyers within university
	Number of individuals with a p-card
	Number of RFP's issued annually
	Percentage of on-contract spend
	Number of master pricing agreements
	Number of new system-wide contracts
	Number of p-card transactions
	Number of procurement staff
	Number of staff dedicated to PO generated transactions
	Number of staff dedicated to strategic initiatives (analysts, strategic sourcing managers, etc.)
	Number of hours spent on strategic initiatives
	Number of procurement transactions
	Number of transactions processed by Procurement with Purchasing Involvement
	Number of transactions approved via automated processing without purchasing involvement
	Number of direct to AP transactions
	Number of small-dollar purchase transactions
	Total money expended on historically underutilized businesses
	Total value of blanket orders
Efficiency	eCommerce utilization rate by number of transactions
	eCommerce utilization rate by total spend
	Number of new contracts negotiated per staff member
	Number of one-off purchases bid or sourced per staff member
	Average time from requisition received to PO generated
	Average time from PO generated to PO submitted to vendor
	Average time of PO submitted to goods received
	Percentage of invoices paid within 10 business days

Source: EAB interviews and analysis.

Procurement (continued)

Metric Category	Metric
Effectiveness	Number of approved exceptions to mandates
	Number of blanket orders (purchase orders established for a not-to-exceed dollar amount covering a specific period of time)
	Number of commodity industry conferences attended per year
	Number of suppliers purchased from annually
	Number of e-procurement enabled suppliers
	Number of hours spent in training for all procurement staff
	Number of individual users trained in procurement processes
	Number of Procurement information and education sessions offered to campus staff per year
	Number of late deliveries
	Number of low-dollar procurement orders processed manually (excludes p-card purchases)
	Number of negotiation sessions attended by buyers
	Number of procurement professional development sessions per year
	Number of redeliveries
	Number of historically underutilized business enterprises vendor outreach activities
	Number of substantive audit findings involving procurement and contract policies, procedures, or performance
	Percentage of low-value orders processed as percentage of total requests processed
	Percentage of purchase orders and invoices that include item-level details
	Percentage of requisitions processed electronically
	Percentage of spend with top 20 percent of suppliers
	Percentage of suppliers invoices received electronically
	Percentage of unallowable p-card purchases (relative to all)
	Procurement technology cost as percentage of spend
	Revenue generated through prebates or charge-backs and fees
	Total rebates from p-cards and prompt payment discounts
	Total dollars spent through eCommerce solution
	Percentage of transactions flowing from procure to pay electronically without manual intervention

Source: EAB interviews and analysis.

A Six-Step Filtering Process

Considerations for Customizing Metrics to Your Unit

This section details a six-step filtering process to help unit leaders identify 8-12 core performance metrics from the starting list of metrics on the previous pages. The first two considerations filter metrics based on straightforward pragmatic limitations and strategic priorities, respectively. These two steps combined typically eliminate more than half of the full starting list of potential metrics. The next three considerations allow unit leaders to account for unit- or institution-specific circumstances. The final consideration ensures an equitable distribution of metrics across unit functional or strategic categories.

Leaders can access additional guidance on how to apply these filters in the full Selecting Core Performance Metrics toolkit, available for download at the web link at the bottom of the page. In the toolkit, a supporting tool or exercise accompanies each consideration to help unit leaders complete each step of the filtering process.

Consideration	Criterion	Action
1 Applying a Reality Check	Information system must possess the capability to generate data on metrics	Set aside metrics not readily accessible, regularly tracked, supported by reliable data, or easily communicated to others
2 Mapping to Strategic Objectives	Direct linkage between improvement on metrics and progress on key institutional objectives	Identify metrics that most directly measure progress on units' strategic objectives
3 Confirming Metric Benchmarks	Availability of credible, objective benchmarks	Make special note of metrics for which credible benchmarks exist
4 Swapping Lagging for Leading Metrics	Capacity of metric to provide "the scoop" on emerging challenge or opportunity	Where feasible, identify leading indicators and substitute for measures providing information "after the fact"
5 Accounting for Unit-Specific Imperatives	Need for heightened focus on short-term, acute challenges facing organization	Add "hot-seat" metrics that shed light on pressing yet temporary areas of concern
6 Ensuring Balance of Metric Categories	Equitable distribution of metrics across all unit functional areas	Force trade-offs in overrepresented areas by sorting metrics by unit function or strategic perspective

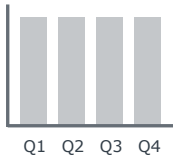
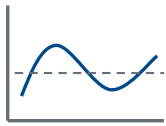
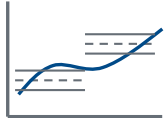
► Electronically access this tool: eab.com/procurement-toolkit

Action Trigger Diagnostic

Of course, rigorous metric selection alone does not ensure that dashboards and performance reports compel corrective action when performance lags. In fact, the impact of well-selected core metrics is often dramatically undermined by the failure to stipulate associated “action triggers”—thresholds that signal underperformance on core metrics and mandate a response or action.

Leaders can assign three types of principled action triggers—static and 100%, fixed, and relative. The diagnostic below is designed to help leaders select the most appropriate trigger type for performance metrics. A series of “no” answers within a category suggests that the trigger type is not well suited to the metric. Answering “no” to all questions below suggests an action trigger should not be attached to the metric, and perhaps the need to reassess inclusion of the metric as a core measure.

The full Selecting Core Performance Metrics publication includes additional information on the different types of action triggers, as well as guidance on setting appropriate triggers. Download the full publication through the link at the bottom of the page.

Trigger Type	Questions	Yes	No
Static and 100% 	1. Is continual improvement (regardless of degree) in metric performance a strategic priority? 2. Is it a strategic priority that metric performance be at 100%? <i>If “no” is answered for both questions, continue to questions 3-4. If “yes” is answered for either question, then a static or 100% trigger is most appropriate; see page 38 for directions.</i>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
Fixed Triggers 	3. Are you working toward an absolute (and nonnegotiable) target? 4. Are you guarding against exceeding an absolute (and nonnegotiable) cap on performance? <i>If “no” is answered for both questions, continue to questions 5-8. If “yes” is answered for either question, a fixed trigger is most appropriate; see page 40 for directions.</i>	<input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/>
Relative Triggers 	5. Are you seeking to identify when current performance deviates significantly from past performance? 6. Are you seeking to detect statistically significant performance trends? 7. Are you seeking to routinely compare a metric’s current performance against cumulative performance toward target? 8. Are you seeking to uncover simultaneous changes in performance among related metrics? <i>If “yes” is answered for any question, then establish a relative trigger; see page 36 for directions.</i>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

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Source: EAB interviews and analysis.



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1

Process Automation and Redesign Tools

2

Data and Metrics Optimization Tools

3

Staffing and Organizational Development Tools

- Tool 3: Compendium of Strategic Position Descriptions
- Tool 4: Dedicated IT Contract Reviewer Toolkit
- Tool 5: Guide to Conducting Behavioral-Based Interviews

4

Customer Communication Tools

Tool 3

Compendium of Strategic Position Descriptions

Overview

This compendium contains position descriptions for eight strategic sourcing, data analysis, relationship management, and contract management roles. Position descriptions span early-career to senior roles. Profiled position descriptions are representative of industry-wide hiring trends for procurement staff. They illustrate new types of positions procurement leaders are creating, as well as skills to prioritize when hiring new staff.

All position descriptions were created and published in 2017 and 2018.

Goal

Use this compendium to revise procurement position descriptions when current staff members vacate their roles. Leaders should also review the descriptions of new roles other institutions have created and consider the need and ability to introduce similar positions in their units.

▶ Electronically access this tool: **eab.com/procurement-toolkit**

Summary of Position Descriptions in This Compendium

Overview

This compendium contains position descriptions for five types of roles that procurement leaders are creating or rewriting to expand their units' strategic capabilities. Consult the table below for an overview of the positions, and turn to the associated pages to review the full position descriptions.

Institution	Position Title	Educational Requirements	Work Experience	Page Number for Full Position Description
<i>Strategic Sourcing Manager</i>				
Brown University	Strategic Sourcing Manager–Facilities MRO ¹	BA/BS required, professional certifications preferred	3 years in strategic sourcing and category strategy	22
Long Island University	Sourcing and Procurement Manager	BA/BS required, MBA preferred	2-5 years	24
<i>Strategic Buyer</i>				
Embry-Riddle Aeronautical University	Grant and Research Strategic Sourcing Purchasing Agent	BA/BS required, professional certifications preferred	3 years, preferably in higher education purchasing	27
Queen's University	Procurement Specialist	BA/BS required, CSCMP certification preferred	10 years, with at least 2 years in complex procurements	30
<i>Data Analyst</i>				
Virginia Tech	Data Analyst	Master's required, professional certifications preferred	Demonstrated experience in data analysis and business intelligence	34
Wayne State University	Procurement Analyst	BA/BS in accounting, business administration, economics, or finance	3 years, preferably in data analysis	36
<i>Contract Manager</i>				
Private Research University	Contract Manager	BA/BS required, JD preferred	5 years	38
<i>Relationship Manager</i>				
Arizona State University	Assistant Director, Strategic Relationships	BA/BS required, excepting candidates with more than 9 years of customer service experience	5 years in customer service	40

1) Maintenance, Repair, and Operation



Brown University

Location: Providence, Rhode Island

Type of Institution: Doctoral Universities: Very High Research Activity

Enrollment: 6,988 undergraduate; 3,107 graduate



Strategic Sourcing Manager–Facilities Maintenance, Repair, and Operations (MRO)

Position Type: Strategic Sourcing Manager

Reporting Lines: Reports to Senior Director of Insurance & Purchasing Services

Educational Requirements: BA/BS required, professional certifications preferred

Work Experience: 3 years in strategic sourcing and category strategy

Skills Emphasized: Financial analysis, data analysis, change management

Position Summary

The Strategic Sourcing Category Manager–Facilities MRO requires a seasoned strategic sourcing professional with a proven track record of success in identifying and achieving savings targets through the development and execution of category strategies. This person will be part of the Strategic Sourcing Team in Purchasing Services, in partnership with Facilities Management, and will be focused on analyzing spend, assessing business needs, and conducting market research to identify savings opportunities and implement category strategies to achieve savings targets. This person will work collaboratively with FM stakeholders to improve processes in this area by providing guidance and implementing best practices for the purpose of reducing spend on materials and services by initiating and leading RFP processes and negotiating contracts to consolidate, lower, and drive spend to strategic supplier partners. This person will execute strategic sourcing events in partnership with FM stakeholders, track and report on savings and other key metrics, and facilitate business reviews with strategic, contract suppliers to evaluate and report on performance to support supplier relationship management efforts.

Responsibilities

Specific responsibilities include identifying, promoting/initiating, and managing strategic sourcing opportunities through historical spend data analysis and business needs assessment; working closely with FM staff to codevelop sourcing requirements, specifications, and supplier evaluation criteria; facilitating the procurement process, including Request for Proposals (RFPs) in compliance with University procurement guidelines; managing the contracting process and providing ongoing oversight of key supplier relationships. This initial focus of this position will be on MRO, but it will eventually expand into other areas of Facilities Management, as well as additional categories.

Success in this position requires leading sourcing events and developing category strategies; achieving and quantifying savings that are in line with targets; continual monitoring and reporting on key metrics; establishing collaborative stakeholder relationships and influencing buying behaviors to gain buy-in for process improvements and recommended strategies; developing and maintaining category subject matter expertise; and executing and managing competitive University-wide contracts and supplier relationships. Maintaining open communication and collaboration between FM key stakeholders and Strategic Sourcing will be critical to ensure continued strategic procurement effectiveness and success.

Source: IPEDS; Brown University, Providence, RI; Brown Career Site, <https://brown.wd5.myworkdayjobs.com/staff-careers-brown/jobs>; EAB interviews and analysis.

Brown University (cont.)

Strategic Sourcing Manager–Facilities MRO

Qualifications

- Bachelor's degree, or equivalent combination of experience and education in an applicable field
- Minimum of 3 years of direct experience in "Strategic Sourcing" and developing category strategies
- Proven track record of achieving savings
- Proven negotiation skills and contract management experience
- Strong analytical skills and experience developing and reporting on metrics and quantifiable savings
- Critical-thinking and problem-solving abilities
- Ability to build relationships, develop internal and external partnerships, and influence change
- Strong verbal and written communication and presentation skills
- Experience with data analysis using an ERP/WMS (integrated work management systems)
- Knowledge of market conditions/trends in a Facilities-related environment
- Knowledge of procurement in a university setting preferred
- Change management experience helpful
- Professional certifications in strategic sourcing, supply chain, procurement preferred
- This position requires a strong commitment to promoting diversity and inclusion in the Finance Division.



Long Island University

Location: Brookville, New York

Type of Institution: Masters Colleges and Universities: Larger Programs

Enrollment: 6,316 undergraduate; 2,363 graduate



Sourcing and Procurement Manager

Position Type: Strategic Sourcing Manager

Reporting Lines: Reports to Director of Sourcing and Procurement

Educational Requirements: BA/BS required, MBA preferred

Work Experience: 2-5 years

Skills Emphasized: Financial analysis, communication, database and technology skills

Position Summary

The Sourcing and Procurement Manager reports to the Director of Sourcing and Procurement and is responsible for sourcing strategy and cost-management and compliance initiatives. The position supports the efforts of the Office of Sourcing and Procurement staff.

The Manager will work with the Director and Administrator to develop immediate, near- and long-term strategic objectives based upon an assessment of the University's needs, peer analyses, and past and future spending. The Manager must be able to frequently communicate with multiple stakeholders including Suppliers, Faculty, Staff, Administration, and Senior Executives on all University Campuses. In addition, this person must have the ability to travel to regional campuses and the flexibility to occasionally work additional hours.

LIU has established goals for improving its capabilities through process streamlining, more efficient and effective use of PeopleSoft functionality, and cost savings/compliance initiatives. Toward that end, the incumbent will play a key role in executing daily functions as well as helping to identify opportunities that focus on vendor consolidation, cost reductions, efficiencies, ongoing quality improvement, market trends, supplier intelligence, and other relevant information.

Principal Responsibilities

Vendor Contracts:

Overseeing the administration of Vendor Contracts (maintenance and other), including:

- Negotiating specific commodity price agreements
- Contract audits and compliance
- Insurance and risk compliance
- Leading vendor relations
- Evaluating usage reports
- Reviewing and analyzing purchases to establish standards

Long Island University (cont.)

Sourcing and Procurement Manager

Principal Responsibilities (cont.)

Operations:

- Codeveloping, documenting, and implementing comprehensive purchasing policies and procedures that leverage industry leading practices
- Ensuring that policies, procedures, and required forms are updated as necessary to reflect current practices and are effectively communicated to the user community via the University website and other communication methods
- Assisting departments with procurement processes in connection with engaging consultants or general contractors, as well as purchasing capital equipment
- Ensuring the use of University Wide Purchasing Agreements contracts where applicable

Analysis / Reporting:

- Prepare, monitor, and analyze spending at the commodity, supplier, and requisition levels
- Develop metrics and custom queries to support cost saving measures, compliance, and reporting requirements
- Understand the University spending and usage patterns and identify targeted savings opportunities
- Conduct spending analytics to evaluate University purchasing trends (campus-based, University-wide, and industry-related), with the objective of negotiating University-wide Purchasing Agreements where feasible
- Partner with colleagues and internal/external constituents to control costs, comply with policies, and support [LIU Buy] marketplace
- Develop, plan, and support the implementation of new purchasing programs resulting from Strategic Sourcing activities
- Identify and initiate new opportunities within the vendor and commodity pool for contract negotiation and facilitate price agreements and contracts as needed
- Leverage reporting tools in support of spending category management strategies
- Interact with Information Technology for development and modification of management and key department user reports
- Work closely with director and purchasing peers including Office of Legal Counsel, Budgets and Finance, IT, Facilities, Tilles Center and Academic Affairs to monitor contract renewals and participate frequently in negotiating appropriate business terms and pricing on behalf of the institution
- Work with director and Legal Counsel's office to develop and deploy standard contracts required for procuring specified goods and services in accordance with University terms and conditions

Qualifications

- Minimum of a Bachelors Degree
- An MBA is preferred
- Two to five years of demonstrated related experience in a Sourcing, Contracts, or Buying environment
- Ability to analyze, detail-oriented
- Have advanced skills in MS Excel and Access, experience with relational databases and reporting tools
- Demonstrated experience with ERP systems and e-procurement tools (Oracle, PeopleSoft experience preferred)
- Proven expertise in a combination of purchasing, strategic sourcing, and business management

Long Island University (cont.)

Sourcing and Procurement Manager

Qualifications (cont.)

- Experience in employing strategic sourcing methodologies (stakeholder engagement, RFP process, etc.) and large contract negotiations
- Experience leading cross-functional teams to realize cost-saving opportunities
- Long-range procurement strategies and planning
- Expert communication skills
- Time management and flexibility to work additional hours during peak times as necessary
- Knowledge of the entire requisition through disbursement cycle

Core Skills

- Ability to stay current with higher education procurement industry trends through active participation in national and regional user groups, thought leadership, and ongoing interaction with counterparts at peer institutions
- Familiarity with purchasing guidelines and industry best practices
- Effective oral and written communication and presentation skills
- Comprehensive problem-solving and conflict resolution skills
- Ability to effectively document and update purchasing policies and procedures and explain changes to impacted users in the purchasing community
- Strong interpersonal, written, and oral communication skills
- Must be able to make decisions and solve problems quickly within area of responsibility



Embry-Riddle Aeronautical University

Location: Daytona Beach, Florida

Type of Institution: Master's Colleges & Universities: Medium Programs

Enrollment: 5,729 undergraduate; 609 graduate



Grant and Research Strategic Sourcing Purchasing Agent

Position Type: Strategic Buyer

Reporting Lines: Reports to Director of Procurement Services

Educational Requirements: BA/BS required, professional certifications preferred

Work Experience: 3 years, preferably in higher education purchasing

Skills Emphasized: Financial analysis, customer service, project management, ERP experience

Position Summary

Under the oversight of the Director of Procurement Services, with dotted line reporting to the Director, Office of Sponsored Research Administration, this position will work in partnership with the Procurement Team to be the first point of contact for grant- and research-related procurement at the University. This position is responsible for providing effective customer service for all internal customers by utilizing acquired knowledge of University and Procurement policies and procedures.

This position interacts primarily with research faculty to provide information in response to questions and concerns in person, by phone, and by email. Expert communication and listening skills are a necessity. By listening effectively to find the root cause of issues, and communicating in a clear and approachable way, this position will resolve issues and provide a positive customer experience in a timely manner.

Responsibilities

This position will meet the daily needs of the University by processing daily purchase requisitions, purchase orders, and bids with a primary focus on grant- and research-related purchases. This position will also work with the Procurement team in identifying those areas of spend that would benefit from strategic sourcing.

Duties include projects and issues of medium to high complexity that require demonstrated knowledge across multiple technical areas and business segments of University policies, procurement policies under the Uniform Guidance (2CFR part 200) Standards, and Federal Acquisition Regulations (FARs). The Strategic Sourcing Purchasing Agent will ensure compliance based on University policies and regulatory guidelines. The ideal candidate will have a proven track record of strategic analysis, negotiation, and cost management, with increasing level of responsibility.

The position will require the ability to work with the other team members and the University community to ensure a spirit of college-wide collaboration and teamwork. Furthermore, the ability to work independently on complex projects and exercise sound judgment while meeting tight deadlines is essential.

Embry-Riddle Aeronautical University (cont.)

Grant and Research Strategic Sourcing Purchasing Agent

Responsibilities (cont.)

This new position provides the opportunity to improve processes and meet the changing needs of the University by focusing on the following :

- Provide consulting and guidance to research faculty members for purchasing related to grant and contract proposals
- Identify purchases that require interdepartmental coordination and ensure that grant and contract proposals include total cost of ownership and comply with University policies and practices
- Take the lead in reviewing and processing purchase requisitions on a daily basis
- Work as part of the bid team with the solicitation process for commodities and services by conducting bid openings and pre-proposal meetings, and evaluating the responses for a successful outcome
- Work with the Directors of Procurement and Sponsored Research in developing and implementing strategic purchasing plans and strategic sourcing processes to further enhance the bid process and efficiently drive spend with a focus on grants and contracts
- Work in a consulting role with various departments within the University to understand their needs and provide guidance on purchasing best practices and sourcing methods
- Identify, track, and measure cost containment and other sourcing metrics to support management decision-making
- Perform analysis to identify opportunities to consolidate purchases and leverage University-wide spending, identifying those goods and services that would benefit from a strategic bid process
- Recommend changes in processes to provide efficiency and enable IT solutions to automate manual tasks and streamline processes

Skill Set

- Exhibit strong negotiation skills, analytical ability, good judgment, and strong operational focus
- Knowledge of procurement standards under the Uniform Guidance and of FARs (shown in qualifications)
- Knowledge of supply chain and/or procurement functions and procedures
- Strong verbal and written communication skills to foster open communication and promote positive relationships
- Proven track record of excellent customer service to internal and external customers
- Ability to maintain work priorities in an environment with multiple concurrent tasks and projects while meeting deadlines with minimum supervision
- Proven ability to be proactive and take initiative in day-to-day activities in order to implement process improvements
- Proficient in Microsoft Office, including Outlook, Word, Excel, and PowerPoint
- Proficiency with procurement tracking tools systems, with ability to create complex spreadsheets
- Ability to handle confidential information with discretion
- Ability to work within a budget
- Ability to learn quickly and move on from both success and failure
- Ability to handle stressful situations—a positive attitude is essential
- Ability to provide timely feedback to management regarding challenges or concerns
- Ability to work in an organized manner and consistently follow up on tasks

Source: Embry-Riddle Aeronautical University, Daytona Beach, FL; Careers @ Embry-Riddle, <https://embryriddle.taleo.net/careersection/002/jobsearch.ftl?lang=en>; EAB interviews and analysis.

Embry-Riddle Aeronautical University (cont.)

Grant and Research Strategic Sourcing Purchasing Agent

Skill Set (cont.)

- Ability to accept responsibility and ownership for decisions, actions, and outcomes
- Ability to work with the Office of Sponsored Research Administration, the Budget Office, and the Controller's Office on payment/process issues
- Ability to listen, document, and help resolve conflicts with patience and minimal guidance
- Ability to document the patterns and queries that may indicate a larger problem, and the ability to work toward resolution
- Problem-solving skills
- Ability to think under pressure

Required Qualifications

- Bachelor's degree required
- 3 or more years of experience in procurement or strategic sourcing required
- Knowledge of procurement policies under the Uniform Guidance and Federal Acquisition Regulations
- Proficiency with e-procurement systems

Preferred Qualifications

- Oracle EBS experience
- Professional certifications such as Certified Professional in Supply Management (CPSM), Certified Purchasing Manager (C.P.M.) designation from the Institute of Supply Management (ISM), or NIGP's Certified Public Purchasing Buyer (CP PB) designation
- Higher education purchasing experience



Queen's University

Location: Kingston, Ontario, Canada

Type of Institution: Public Research University

Enrollment: 22,253 undergraduate; 4,527 graduate



Procurement Specialist

Position Type: Strategic Buyer

Reporting Lines: Reports to Associate Director of Strategic Procurement Services

Educational Requirements: BA/BS required, CSCMP certification preferred

Work Experience: 10 years, with at least 2 years in complex procurements

Skills Emphasized: Data analysis, teamwork, knowledge of eProcurement or B2B systems

Position Summary

Reporting to the Associate Director, Strategic Procurement Services, the Procurement Specialist is responsible for developing a strategic approach for sourcing of products and services for the University. The Procurement Specialist is further responsible for supporting the efforts of the university, including faculty, Principal Investigators, and staff through effective procurement process assessment and implementation. The position also sources products and services from suppliers, maintaining good supplier relationships, and working with all university clients and Financial Services to ensure that the sourcing processes are used and products are acquired in the most effective manner and in compliance with University Procurement Policy and granting agencies' guidelines, where required, and to arrange for delivery to the university on time to meet client requirements. The Procurement Specialist will also provide analytical support to management team and make recommendations that support the mission of Procurement Services.

Key Responsibilities

- Lead sourcing projects working with a diverse group of university stakeholders, to ensure best supplier selection and value for the University.
- Develop a strategic approach to the supplier and product rationalization relating to equipment, products, and services to maximize the potential of enterprise agreements and alliances by employing a professional knowledge base and analytical techniques.
- Lead the requirements identification process with teams consisting of university stakeholders to ensure the university requirements and granting agency requirements are met for strategic procurement activity. Identify relevant sourcing strategies and procurement processes, including development of any necessary RFI, RFQ, RFSQ, or RFP documents.
- Perform supplier, market, and category analysis, focusing on the relative competitive positioning of current and potential suppliers, changes to supplier cost structures, technology trends, and competitive activities. Provide recommendations and risk mitigation strategies based on findings to the Director.
- Actively participate in the departments' efforts to promote an inclusive and welcoming work environment.
- Ensure that the Queen's procurement process and policy is equitably applied to each procurement, including online posting system(s) to ensure that all suppliers are given equal opportunity to compete for the University's business.

Queen's University (cont.)

Procurement Specialist

Key Responsibilities (cont.)

- Assess, define, and resolve complex procurement issues, including contractual terms and conditions and escalations by internal stakeholders and suppliers. Formulate solutions and consult or advise the Associate Director or Director when necessary.
- Maintain files pertaining to procurement activity and research award finalization, where applicable, to ensure compliance with University Procurement Policy and granting agencies' guidelines.
- Establish Fair Market Value and conduct or coordinate Fair Market Value appraisals where necessary, including resale and removal of expended university assets.
- Determine in-kind offerings, with the suppliers and researchers, and conduct or coordinate appraisals where necessary.
- Monitor procurement activity, with and on behalf of University client departments, recommending procedural/policy changes as needed.
- In collaboration with the other procurement personnel, the Grant and Institutional Programs (GRIP), and University Research Services (URS), review the procurement process and how it serves the research client to establish continuous improvement of this process.
- Maintain metrics for process improvement, supplier management, and management reporting.
- Establish, monitor, and take remedial actions to resolve supplier relationships.
- Negotiate agreements that deliver strategic value to the organization and support the University's programs, including research and large capital and infrastructure projects.
- Liaise with internal/external associates regarding integration opportunities through RFPs and Contracts for research equipment and products integrating the approach, where applicable, to the overall Procurement mandate.
- Provide day-to-day procurement information, leadership, and guidance to researchers, staff, students (i.e., Queen's Community) and to many external vendors and other outside sources.
- Maintain and develop web content related to research procurement to be posted to the Strategic Procurement Services website.
- Write reports, deliver presentations, and suggest policy and process changes.
- Undertake other duties as required in support of the Unit.

Required Qualifications

- An Undergraduate Degree.
- CSCMP (Certified Supply Chain Management Professional) Certification or enrolment in Supply Chain Management Association of Ontario designation program or the combination of education and experience is an asset.
- Ten (10) years purchasing experience with minimum of 2 years related experience in complex procurements.
- Consideration may be given to an equivalent combination of education and experience.
- Must recognize and value the strategic advantage that diverse knowledge and perspectives bring to an organisation.
- Knowledge of procurement regulations, including federal, provincial, international, and local directives.
- Knowledge of Broader Public Sector procurement rules and legislation.
- Knowledge of contract law, inventory control, and duty and taxation regulations related to public procurement processes.

Queen's University (cont.)

Procurement Specialist

Required Qualifications (cont.)

- Must be proficient in the use of PCs and word processing, spreadsheet, and email (MS Word, MS Excel, Outlook/email, and Internet Explorer) in a Windows environment.
- Working knowledge of eProcurement or B2B systems would be considered an asset.
- Superior negotiation and problem-solving skills as demonstrated through experience.
- Ability to gather, analyze data, and prepare written reports and direct others in the requirements of data analysis.
- Must possess strong interpersonal skills and the ability to work independently and as a member of the team.

Special Skills

- Excellent organizational skills. Ability to cope with multiple demands and resolve priority conflicts.
- Superior communication (both verbal and written) and interpersonal skills are critical. Ability to interact with many individuals internally and externally in a variety of contexts.
- Analytical and interpretive skills. Ability to retrieve and produce metrics data from a wide variety of sources. Ability to conceptualize creative plans and workable solutions for dealing with a wide array of internal and external people.
- Knowledge of university policies and procedures with respect to procurement.
- Self-motivated and possess ability to work independently as well as a member of a team.
- Must be objective, fair, impartial, and flexible while adhering to the ethical standards set forth by the Broader Public Sector Procurement Directive and Queen's University Procurement Code of Ethics.
- Project management skills.
- Problem-solving and conflict resolution skills.
- Ability to lead and coach associates and clients in improvement of procurement practices skills.
- Ability to lead cross-functional teams of people from varying departments not reporting to Strategic Procurement Services.
- Attention to detail and accuracy.

Decision-Making

- Determine strategy for university sourcing requirements to ensure cross-functional requirements are met while ensuring best results for the University.
- Determine strategic approach to supplier and product rationalization to maximize outcome of enterprise agreements.
- Determine and develop service-level metrics related to each product/service sourced, including a supplier-monitoring process. Determine the approach required to lead teams (clients and procurement professionals) to ensure the University requirements are met to meet the strategic plan for procurement activity.
- Determine analysis required and appropriate presentation and recommendations of findings.
- Determine and take appropriate action to resolve issues that arise for researchers in the procurement and granting processes (related to procurement) to expedite the research project process.
- This position will lead sourcing teams to supplier selection decisions and take the lead to explain and justify to University client and management.

Queen's University (cont.)

Procurement Specialist

Decision-Making (cont.)

- Determine appropriate solution to resolve complex procurement issue. Determine when issues should be brought to the Directors' attentions.
- Verify the acceptability of justifications for exemptions to the University's Procurement Policy provided by University departments before sign-off by the Director of procurement.
- Review procurement processes and make redesign decisions to improve process effectiveness and efficiency.
- Perform valuation of in-kind offerings, where required.



Virginia Tech

Location: Blacksburg, Virginia

Type of Institution: Doctoral Universities: Very High Research Activity

Enrollment: 27,193 undergraduate; 7,247 graduate



Data Analyst

Position Type: Data Analyst

Reporting Lines: Reports to Director of Procurement

Educational Requirements: Master's required, professional certifications preferred

Work Experience: Demonstrated experience in data analysis and business intelligence

Skills Emphasized: Database skills, financial analysis, relationship management

Position Summary

Reporting to the Director of Procurement, the Data Analyst will extract and analyze spend data for goods and services purchased by the university to identify and predict spending trends and historical volumes; utilize established and emerging techniques to find consistent patterns and correlations that will assist the university's procurement process. Data analysis results will aid in analyzing vendor and contract performance levels, aid in developing favorable negotiation strategies and helping to identify future contracting opportunities that will achieve the greatest savings opportunities for the University. Develops, implements, and maintains tools to extract and examine data from multiple internal, external, and/or nontraditional sources. The Analyst will serve the procurement department in the advancement of its annual objectives and strategic initiatives, with a particular focus providing data needed for informed decisions.

Core Job Responsibilities

- Establish and provide analytics capability to assist the Procurement department with making data driven decisions related to procurement and financial matters. Conduct spend, price, and trend analysis of data from the University's eProcurement system data and the University's ERP finance system. (40%)
- Mines data and analyzes data sets using multiple platforms (SQL, SAS, Microstrategy, etc. (20%)
- Partner with other analytics professionals within the University's Finance Division and across the university to understand, adapt, and prepare data for use. (10%)
- Provide sophisticated but easy-to-understand analysis and reports based on data analysis. (20%)
- Develop customized presentations in narrative, visual, and/or oral form, for the appropriate stakeholder(s). (10%)

Required Qualifications

- Master's degree in a related field or a Bachelor's degree in a related field with significant experience or training.
- Proficiency in business intelligence/analytics tools (SQL, SAS, Microstrategy, etc.)
- Demonstrated experience working with complex data in a relational database environment.
- Excellent communication, critical-thinking, interpersonal, and presentation skills.

Virginia Tech (cont.)

Data Analyst

Required Qualifications (cont.)

- Advanced skills with current Microsoft Office software and expertise specifically with Excel.
- Success in building and maintaining customer relationships at multiple levels.
- Demonstrated ability to work professionally and effectively as a productive team and/or a committee member.

Preferred Qualifications

- Experience working in higher education at a public research university.
- An understanding of higher education eProcurement, ERP systems, and architecture.
- Advanced degree or professional certification in a data analytics- or business intelligence-related field.
- Intermediate or advanced knowledge in the field of statistics.



Wayne State University

Location: Detroit, Michigan

Type of Institution: Doctoral Universities: Very High Research Activity

Enrollment: 17,297 undergraduate; 9,767 graduate



Procurement Analyst

Position Type: Data Analyst

Reporting Lines: Reports to Assistance Vice President of Procurement and Strategic Sourcing

Educational Requirements: BA/BS in accounting, business administration, economics, or finance

Work Experience: 3 years, preferably in data analysis

Skills Emphasized: Financial analysis, communication, teamwork, learning agility

Position Summary

Analyze data to measure and qualify opportunities for strategic procurement initiatives. Conduct detailed and comprehensive data and spend analysis, identifying and quantifying potential savings opportunities. Conduct proactive analysis of the spending environment to gain more insight on commodity spend to assist in the creation of procurement strategies. Produce routine and special reports, projections, and presentations to meet unit needs.

The Procurement Analyst reports to the Assistant Vice President of Procurement & Strategic Sourcing and works in tandem with the Associate Director and Buyers within the department.

Essential Job Functions

- Perform comprehensive analysis to identify opportunities to leverage university spend. Extract and analyze information from internal systems to compile relevant data and prepare a variety of detailed reports and presentations to share findings with management in an impactful and organized manner.
- Track key performance metrics (KPIs) and produce special reports designed to measure the effectiveness and efficiency of strategic initiatives and other departmental activities.
- Mine, validate, cleanse, analyze, and enhance spend data from various reports to determine where cost savings and efficiencies may be achieved (i.e., reduce goods and service costs through informed strategic procurement strategies based on data, improve contract compliance, facilitate early supplier integration, reduce spend analysis project cycles).
- Participate in the review of vendor proposals related to strategic opportunities and perform comprehensive analysis to determine the best viable option. Assist with development of strategic business cases, through detailed analysis of contracts, spend usage patterns, and benchmark data.
- Propose recommendations for the implementation of best practices regarding strategic procurement, which maintain and ensure compliance with University policies and state regulations.
- Maintain open channels of communication with buyers, campus customers, and other stakeholders to understand their current and future purchasing needs.
- Participate in special projects that are designed to enhance unit operations and services. Develop and present insights and anecdotes from the data by developing short-range spend, long-range spend, and savings projections. Prepare periodic activity reports, summaries, and recommendations.

Wayne State University (cont.)

Procurement Analyst

Education

- Bachelor's degree in Accounting, Business Administration, Economics, Finance or related field, or an equivalent combination of education and/or experience.

Experience

- Minimum 3 years of data analysis experience preferred.
- Ability to create and analyze reports, utilizing Cognos or comparable business intelligence systems.
- Knowledge of data analytics and how to access, sort, formulate, and manipulate supplier, market, price, and spend data.
- Knowledge of current public purchasing or other institutional purchasing practices and procedures preferred.
- Knowledge of Banner Finance System (FMS) or comparable online integrated Finance or Purchasing/Payables system.

Knowledge, Skills, and Abilities

- Communication Skills: Strong written and verbal communication skills. Ability to evaluate, interpret, explain, and present information effectively and professionally.
- Technical Skills: Highly proficient in the use of MS Suite applications especially Excel, PowerPoint, and Word. Strong understanding of financial systems and financial data flows.
- Learning Agility: Independent and innovative self-starter who displays an ability to learn quickly and easily adapts to changing situations. Experience researching topics to gain knowledge and understanding when information gaps exist.
- Teamwork: Ability to collaborate effectively with colleagues within and outside the organization. Ability to produce high-quality and consistent results with assistance of team members; provide support to teammates when tackling complex projects

Preferred Qualifications

- Analyst background and the ability to work with complex spreadsheets
- Analysis experience with a preferred background in forecasting, inventory analysis, demand planning, or financial analysis



Private Research University

Type of Institution: Doctoral Universities: Very High Research Activity



Contract Manager

Position Type: Contract Manager

Reporting Lines: Reports to Executive Director of Procurement

Educational Requirements: BA/BS required, JD preferred

Work Experience: 5 years, preferably in higher education contract administration

Skills Emphasized: Communication, project management, knowledge of software (e.g., Jaggaer)

Position Summary

This position ensures consistent management of all proposals and contracts, oversight of the contract management process, development of specific standards for bidding and submission, and contract management. In the contract development process, this role will require close collaboration with various schools and departments, including the general counsel and risk management.

Required Education and Experience

- Bachelor's degree from an accredited institution of higher education
- Law degree is highly desirable
- Five (5) years of professional experience in contract negotiation and administration with demonstrated understanding of contract terms and conditions; understanding of performance measures; and contract administration
- Professional experience in a higher education institution is preferred

Required Knowledge, Skills, and Abilities

- Excellent written and oral communications
- Skill to accurately interpret what others are saying
- Ability to articulate goals, strategies, and direction
- Organization skills and ability to meet critical deadlines
- Ability to work independently and under pressure, to manage multiple tasks and responsibilities
- Deal with changing deadlines while maintaining effectiveness
- Proficient in Microsoft Office Suite
- Experience with Jaggaer (SciQuest) Contract Manager tool or comparable system is preferred

Private Research University (cont.)

Contract Manager

Proposed Duties

- Review/draft contracts and amendments in preparation for legal sufficiency; review and amend as appropriate to protect the University from liability and risk; prioritize contracts to meet applicable deadlines; interpret contract terms and conditions; work collaboratively with stakeholders, Office of General Counsel, and Procurement managers to resolve contract conflicts. (40%)
- On all standard and nonstandard contracts for the University's acquisition of goods and services, provide recommendations and interact with suppliers in support of Procurement to negotiate changes to contracts required by the University. (25%)
- As needed, provide guidance on contract matters to internal stakeholders and Procurement, including training to new employees and other key University members in contracting best practices and procedures. Keep current on all University rules and regulations, including Procurement policies and any federal requirements that may impact the University. Perform research and related work as required and assigned. (10%)
- Develop and implement procedures for contract management and administration in compliance with University policy. Manage effective relationships with Office of General Counsel, Risk Management, and Fiscal Officers. (10%)
- Monitor competitive terms. Measure customer satisfaction with our terms and conditions and contracting practices. Recommend changes. Promote cooperation and support for coworkers and professionalism within the organization when interacting with internal stakeholders and external suppliers. (10%)
- Ensure that signed contracts are communicated to all relevant parties to provide contract visibility and awareness. Oversee Service Level Agreement Compliance. Manage contract closeouts, extensions, and renewals. (5%)

Institutional Impact

The Contract Manager is a key role supporting the Procurement activities for the University. The majority efforts of this role include reviewing supplier submitted contracts and amendments in preparation for legal sufficiency, ensuring that contractual language appropriately protects the University from liability and risk and prioritizes contracts so as to meet applicable Procurement/stakeholder deadlines.

Authority and Accountability

The Contract Manager will be accountable to University Senior Leadership for contract compliance as well as customer satisfaction. The primary objective of the position is to ensure favorable terms and conditions are agreed to for the University by supporting stakeholders with the review and finalization of contracts while maintaining customer service and satisfaction across the University. This position will have the authority to negotiate business terms with University suppliers.

Critical Thinking and Decision-Making

The Contract Manager must possess knowledge of and expertise in using various proven negotiation methods and the ability to critically analyze a negotiation to best leverage favorable terms and conditions for the University.

Internal and External Contacts

Office of General Counsel, Risk Management and Insurance, Strategic Suppliers and their respective Legal Counsels, and University stakeholders.



Arizona State University

Location: Tempe, Arizona

Type of Institution: Doctoral Universities: Very High Research Activity

Enrollment: 17,297 undergraduate; 9,767 graduate



Assistant Director, Strategic Partnerships

Position Type: Relationship Manager

Reporting Lines: Reports to Executive Director of Supply Chain

Minimum Requirements: BA/BS and 5 years in customer service *or* 9 years in customer service

Skills Emphasized: Change management, project management, communication skills

Position Summary

This position develops and manages strategies and key initiatives ensuring stakeholders are aligned and common goals are achieved within established time frames. Reports to the Executive Director of Supply Chain.

Essential Duties

- Represents Procurement interests in developing and maintaining strategic partnerships that will focus on internal customers but may include supplier partners and other internal and external stakeholders.
- Works closely and collaboratively with key internal and external stakeholders to execute procurements and strategic initiatives.
- Markets, sells, and represents Procurement department services in order to maximize project involvement in order to reduce timelines and roadblocks.
- Identifies critical resource expertise and targets appropriate internal and/or external sources to ensure optimal outcome(s) to strategic initiatives.
- Develops strategies to successfully implement strategic initiatives.
- Establishes and continually monitors/manages customer expectations and works with Procurement team to exceed expectations; identifies issues for resolution to ensure optimal team effectiveness.
- Prepares and maintains status reports and schedules; tracks milestones/deliverables, critical paths, and dependencies; resets expectations as needed in consideration of project progress/outcomes.
- Collaborates with team members both internal and external to ensure optimal outcomes; builds, develops, and maintains relationships vital to partnership success.
- Works collaboratively with stakeholders, leadership, and other related staff to define and identify all required infrastructure needs to ensure successful launches and ongoing project operations.
- Organizes business review meetings with strategic partners on at least a biannual basis with internal and external stakeholders as needed.
- Facilitates administrative policies and work groups.
- Communicates with other department and university administrators and resolves or assists with the resolution of sensitive issues.

Arizona State University (cont.)

Assistant Director, Strategic Partnerships

Knowledge, Skills, and Abilities

- Strong knowledge of project management principles, change management practices, and techniques needed for large, complex projects.
- Demonstrated success in managing a key client list on complex projects
- Experience with frequently leading meetings and presentations with senior leaders, including C-Level staff
- Experience working directly with procurement and supply chain professionals
- Knowledge of strategic planning
- Skill in interpreting complex regulations into an understandable format for nonexperts
- Skill in project assessment and implementation
- Skill in both verbal and written communication
- Skill in establishing and maintaining effective working relationships and establishing and facilitating work teams.
- Ability to establish and maintain effective working relationships in a diversified population
- Ability to stimulate changes in individual, institutional, and corporate behaviors to create a more sustainable environment
- Ability to lead by example in communicating, participating, and encouraging support of the institution's sustainability programs

Minimum Qualifications

- Bachelor's degree *and* five (5) years of related sales, customer service, or consulting experience; *or*
- Nine (9) years of related sales, customer service, or consulting experience

Tool 4

Dedicated IT Contract Reviewer Toolkit

Overview

This tool helps procurement and IT leaders create full-time, dedicated roles to review technology contracts. Dedicated IT contract reviewers oversee and sign off on all technology contracts, applying common procurement standards (e.g., enterprise licensing, duplication red flagging) and specialized IT knowledge (e.g., data security, business continuity and disaster recovery, infrastructure, and network requirements).

The tool comprises five components:

Component 1: Pro Forma Job Roles and Volumetrics with detailed description of the advantages of dedicated reviewer roles

Component 2: Sample Job Descriptions summarizing position responsibilities and staff experience and competencies needed to fill positions

Component 3: Technical Contract Identifiers to help procurement staff spot contracts needing IT specialist review

Component 4: Fast-Turnaround Review Protocol to minimize time-to-contract

Component 5: Dedicated IT Contract Review Value Scorecard to evaluate campus need for a full-time contract reviewer

Goal

Use this toolkit to design roles and policies to better integrate procurement and IT on campus.













Procurement and IT leaders alike are recognizing increasing purchasing risks as distributed campus buyers enter into more technology contracts and purchase more tech-embedded commodities. In response, leaders should use this tool to evaluate the need to better integrate the IT and procurement functions through a dedicated IT contract reviewer role. Whether or not leaders determine to invest in new roles, they should review the additional resources in the toolkit to improve contract turnaround processes and introduce other policies to reduce IT purchasing risks.

▶ Electronically access this tool: eab.com/procurement-toolkit

Outsized Benefits to Contract Evaluation Specialization

FTE Combining IT and Procurement Expertise Improves Speed and Rigor

With distributed purchasing increasing IT risk on campus, CIOs are facing a growing need for—and an inability to provide—high-caliber technology contract review in line with campus timeline expectations. The best are implementing fast-cycle evaluations by elevating a dual expert to a full-time contract review role.

	Typical IT Contract Review	Dedicated IT Contract Review
 FOCUS Portion of reviewer's attention allocated to technology contract review	 <i>Unit-level technology purchases—when reviewed—are assessed as a side-of-desk role by professionals working in other IT domains and services</i>	 <i>Full-time employee engaged by IT devotes 100% of their time to technology contract review and vendor negotiations for unit-level purchases</i>
 EXPERTISE Breadth of specialized competency applied during contract review processes	 <i>Contracts undergo procurement's checks with limited technology expertise applied to understanding repercussions of the terms and conditions</i>	 <i>The dedicated IT contract reviewer applies procurement and technological expertise simultaneously in contract evaluations</i>
 SYSTEMATIZATION Repeatability and routinization of technology contract review processes	 <i>Contracts are reviewed ad hoc, as discovered by procurement analysts, and receive review by whoever is available from IT</i>	 <i>A senior-level IT professional committed to fast-cycle initial reviews oversees contracts, with established escalation steps for follow-through</i>
 SCALE Percentage of incoming and renewable technology-related contracts assessed	 <i>Limited visibility into campus-wide IT contracting, with many tech-related unit-level purchases evading IT oversight</i>	 <i>85%+ of campus IT contracts are channeled through the review specialist, using a dedicated, multi-channel approach for contract discovery</i>

Source: EAB interviews and analysis.

Component 1: Pro Forma Job Description and Volumetrics

Consolidating Legal and Technical Expertise to Combat Cloud-Era Risk Factors

While procurement offices have historically managed campus purchasing to drive economies of scale and synthesize campus-wide purchasing, IT has amassed specialized expertise and terrain knowledge of the costs and risks associated with technology acquisition. Neither, however, is an expert in the other's field. Uniting this previously siloed expertise has become urgent, with significant risk mitigation and cost savings for institutions uniting these capabilities in one individual.

Contract Review Specialist Attributes

An effective IT procurement coordinator has the ability to move smoothly between technology and contracting language to help end users find solutions to meet their needs, while driving cost savings and comprehensive security in vendor negotiations.



Director-Level IT Experience

10+ years in IT services combined with senior position in IT organization supports institutional gravitas in decision-making



Legal and Technical Proficiency

Expertise in compliance, contracting, and technical IT jargon to address both technology and procurement risk factors



100% Dedication to IT Contract Review

Full-time concentration on IT contracts builds human library of terms and speeds turnover times versus side-of-desk attempts

Target Volumetrics

85%+

Distributed Contracts Vetted

Dedicated partnership for distributed technology purchases scales IT expertise across higher percentage of yearly contracts

200+

Contracts Reviewed and Authorized Annually

With full-time focus on contract review, an FTE can turn over 5-6 contracts per week, or over 200 distinct contracts annually

60%+

Contracts Turned Over Within 3 Days

Aggressive SLAs for first-stage evaluation ensures that end users aren't left bewildered by bureaucratic delays, and simple solutions are fast-tracked

"We're not the biggest IT shop, but it became apparent that so many purchases have an IT component these days that we could keep an FTE fully engaged, and that the expertise they'd accumulate would save us so much money and effort on the back end by avoiding mistakes on the front end."

*Christopher Waters, CIO
Elon University*

Component 2: Sample Job Description

Sample Job Advertisement (Derived from Multiple University Artifacts)

Assistant Director: IT Contract and Vendor Review

Position Summary

Fast-paced role in a high-pressure environment, working to satisfy customer needs among diverse campus constituents. The Assistant Director: IT Contract and Vendor Review must work diligently under minimal supervision to organize and prioritize incoming and renewable contracts for efficient and thorough review against legal and regulatory requirements. The position holder will possess a high standard of customer service and relationship management skills, and will develop sustainable partnerships across campus units.

Role Responsibilities

Negotiation

- Address issues of privacy, compliance, data sovereignty, disaster recovery, information security, risk management, and identity integration, and develop best practices to incorporate these concerns into licensing and procurement processes
- Proactively manage and implement cost-effective licensing for IT and broader technology purchasing arrangements
- Own complex IT problems and solution evaluation, involving in-depth negotiations with third-party IT solution providers

Communication

- Analyze constituent needs and recommend appropriate solutions for faculty and staff in the process of acquiring new technologies
- Actively promote central IT standards in distributed purchasing agreements
- Communicate and promote current services available through enterprise licensing to faculty, staff, and students on campus

Research

- Scan evolving vendor landscape and research capabilities of emerging IT hardware and software offerings and higher education penetration/use cases

Key Skills and Qualifications

- **Education:** bachelors degree, or higher
- 10+ years of experience in IT management, including (but not limited to) service management, enterprise applications, IT analysis, technology acquisitions, vendor negotiations
- Working knowledge of licensing and legal requirements incumbent on universities and colleges in North America (e.g., FERPA, HIPPA, ADA regulations).
- Strong interpersonal skills and relationship management
- Service-oriented, with deep commitment to client satisfaction

Component 3: Technical Contract Identifiers

Hardwiring Discovery of Campus-Wide Tech-Dependent Purchases

Full utilization of the IT contract reviewer demands rigorous identification of purchases with a technology component. The best institutions operate multichannel discovery campaigns, focusing efforts in three areas: mandatory contract cover sheets, eProcurement system flags, and strong relationships with procurement specialists. Even where 100% contract coverage cannot be ensured, high contract throughput is high ROI.



Contract Cover Sheets

Dual-key authorization for technology-related contracts ensures reviewer oversight and sign-off



eProcurement Flags

Unit type filtering in procurement systems funnels IT purchases to the reviewer for green-slighting



Procurement Officer Judgement

Working relationships with procurement offices around campus ensure the passing of technology contracts to expert eyes

ELON UNIVERSITY CONTRACT APPROVAL COVER SHEET
Complete all sections. Incomplete forms will be returned unprocessed.

While University faculty/staff may sign this cover sheet to indicate concurrence with contract terms, only certain designated officials of the University may officially sign the contract on behalf of the University.

Date of Initiation: _____

1. Initiating Department: _____

2. Contract Initiator: _____ Phone: _____ Email: _____

3. Does this contract involve any technology related goods or services? Yes ____ No ____
If yes, approval of Sr. Business Analyst – Campus Technology Support must be obtained.

4. Does this contract involve furniture, construction or renovation? Yes ____ No ____
If yes, approval of the University Architect and SVP Business, Finance & Technology must be obtained.

5. Contract Dates: Start Date _____ End Date _____

6. Description of Contract: _____

Impactful Interactions Increase Repeat Custom

“People have a great experience with the review—we save them money, or help them understand the sensitive nature of the data we’re putting out. Once they’ve worked with us, they’re far more likely to come proactively to us in the future. We’re improving relationships as we go.”

*Tony Rose, Sr. Business Analyst
Elon University*

High ROI without Mandates

85%+ **Contract discovery**
through voluntary self-reporting secures reviewer ROI in averted duplications and security diligence

Component 4: Fast-Turnaround Review Protocol

Expediting the Routine, Engaging Expertise for Exceptions

Elevating one individual to full-time contract reviewing facilitates routinization of dispersed and ad hoc processes. With institutional oversight and high repetition, time-to-contracting is minimized in simple and safe purchases, and dedicated attention ensures units are kept abreast of developments in more complicated cases. High efficiency and increased transparency improve end-user experience, and due diligence is scaled appropriately across all incoming/renewable contracting.

Three High-Impact Reviewer Action Steps, Three Low-Effort End-User Outcomes

1

Classic Contracting and Technology Review

- Duplications and redundancies triaged to existing services and technology offerings
- Low-risk, low-dollar purchases approved
- Identification of SaaS, data-heavy, and high-dollar purchases for contracting deep-dive



2

Disadvantageous Contracting Term Rewrites

- Data storage, SLAs for uptime and bandwidth, third-party access rights, disaster recovery and backup arrangements reviewed and amended
- Cost-effective enterprise licensing agreements arranged for high-demand services
- Complex vendor math assessed and corrected



3

Complex One-Off Negotiations

- Tracking and formalizing complicated third-party storage agreements for SaaS
- Parsing compliance provisions for data subject to FERPA and HIPPA regulations
- Working with end users to determine functionality expectations given contract terms and promises



Component 5: Dedicated IT Contract Reviewer Value Scorecard

To assist members in making the case for recruiting a specialist, and as a template for calculating potential ROI, EAB has put together the following worksheet for assessing campus need. Answer the questions on the left, and evaluate against the Dedicated IT Contract Reviewer to assess requirements for focused technology purchasing reviews at your institution.

Contract Review Productivity



Are We Meeting Turnaround and Coverage Goals?

How many technology contracts do we review per quarter? _____ / 50+

How many technology contracts do we review per year? _____ / 200+

What percentage of contracts receive preliminary review in under 3 days? _____ / 100%

What percentage of campus technology contracts do we review? _____ / 100%

Contract Terms Quality Control



Are We Avoiding Classic Procurement Errors?

Do we have standardized processes to avoid license duplication? Yes / No

Do we secure enterprise-wide, volume-based price discounts? Yes / No

Do we achieve favorable renewal terms in technology contracts? Yes / No

Technology Policy Quality Control



Are We Mitigating Institutional Risks and Increasing Compliance?

What percentage of contracts meet institutional data security standards? _____ / 100%

What percentage of contracts consider FERPA and HIPPA compliance? _____ / 100%

What percentage of SaaS contracts cover appropriate consideration of Business Continuity and Disaster Recovery planning? _____ / 100%

IT Resource Planning



Are We More Accurately Forecasting Downstream Resource Needs?

What percentage of new technology projects are adequately staffed? _____ / 100%

What percentage of our work is categorized as "unplanned" IT projects? _____ / 100%

Tool 5

Guide to Conducting Behavioral-Based Interviews

Overview

This tool helps leaders implement effective behavioral-based interviewing (BBI) processes. After upgrading position descriptions to require new technical skills and professional competencies, leaders need to update their interviewing practices to assess candidates for these skills. While hiring managers can evaluate technical skills through assessments and exercises, they may find it more difficult to evaluate professional competencies. BBI provides a framework to evaluate professional competencies in the interviewing process. This tool includes a comprehensive list of interview questions to assess candidates' aptitude in 15 key competencies. These represent the competencies most frequently sought in budget and planning staff. The tool also includes directions for interviewers on how to evaluate candidates' responses.

The tool comprises four sequential components:

Component 1: Role Competency Selector

Component 2: Competency Question Picklist

Component 3: Interview Note Sheet

Component 4: Multi-Interview
Evaluation Template

Goal

Use this tool to update existing interview practices to assess professional competencies when backfilling roles and/or hiring staff into new roles. Procurement staff increasingly need strong professional competencies such as communication, conflict management, and customer service to succeed in strategic roles. This tool provides both a menu of sample competencies for which leaders can screen in interview processes and questions to use to evaluate candidates' strength in selected competencies.

▶ Electronically access this tool: eab.com/procurement-toolkit

Component 1: Role Competency Selector

Overview

This resource provides a framework for translating job functions into behavioral competencies and technical skills.

Instructions

Use the template on the following page to list the top three to four critical job activities for the open position. Then, for each critical job activity, list the essential technical skills (evaluated through traditional interviewing methods) and professional competencies (evaluated through BBI) needed to successfully complete the activity.

Select behavioral competencies from the following list, which captures the most commonly desired competencies for budget and planning staff:

- Attitude
- Communication
- Conflict resolution
- Critical thinking
- Customer service
- Decision-making
- Diversity awareness
- Flexibility
- Integrity
- Leadership
- Mentorship
- Personal development drive
- Problem-solving
- Process improvement
- Teamwork

EAB recommends narrowing the critical competencies to three to five per position and allowing about 10 minutes to discuss each competency during an interview.

An editable version of this tool is available at eab.com/procurement-toolkit.

Sample Position: Strategic Buyer

<i>Critical Job Activity</i>	<i>Required Behavioral Competencies</i>
1. Lead sourcing projects working with a diverse group of university stakeholders, to ensure best supplier selection and value for the university.	<ul style="list-style-type: none">• Teamwork• Communication• Customer service
2. Negotiate agreements that deliver strategic value to the organization and support the University's programs.	<ul style="list-style-type: none">• Conflict resolution• Critical thinking• Problem-solving• Integrity
3. Monitor procurement activity, with and on behalf of university client departments, recommending procedural/policy changes as needed.	<ul style="list-style-type: none">• Process improvement• Problem-solving• Customer service

Role Competency Selector (cont.)

Role Competency Selector

Position:		
Critical Job Activity	Required Behavioral Competencies	Required Technical Skills
1.		
2.		
3.		
4.		
5.		

Component 2: Competency Question Picklist

Overview

This resource provides a list of potential behavioral-based interviewing (BBI) questions for the 15 competencies most commonly sought in budget and planning staff. Each question is designed to elicit details from the candidate of an actual past experience that tested the targeted competency. To guide candidate evaluation, the tool also outlines ideal and red-flag responses for each question set.

Instructions

After defining role competencies using Component 1: Role Competency Selector, select appropriate BBI questions from the following lists.

Download an editable version of this tool at eab.com/procurement-toolkit.

Attitude

Questions to Ask

- Can you give an example of a time when you have received negative feedback about your job performance? How did you react?
- What frustrates you most about your current position? Can you give an example of how you have dealt with this frustration in the past?
- When was the last time you made a big mistake? What did you do?
- Have you ever taken a substantial risk that has failed? What was it? What did you learn?
- Have you ever had an experience turning a problem into a success? Tell me about it.

Positive Answers

- Accepts criticism well
- Takes accountability for actions
- Tries to rectify unpleasant situations
- Is generally positive and upbeat about work situations

Red Flags

- Overly defensive in response to criticism
- Unable to offer rational justification for actions
- Blames failures on others

Competency Question Picklist (cont.)

Communication

Questions to Ask

- Give me an example of a time you had to explain a technical procurement concept to a non-procurement audience. What were the results?
- Sometimes we are misunderstood by other people. Has this ever happened to you? How did you respond, and what were the results? What did you do to prevent this from happening again?
- Describe a time when you communicated some unpleasant feelings to your supervisor. What happened?
- Tell me about a specific experience that illustrates your ability to influence another person verbally. Feel free to use an example that involves changing an attitude, selling a product/idea, or being persuasive.
- Has there ever been a time when your listening skills really paid off, maybe a time when other people missed the key idea in what was being expressed? Tell me about it.

Positive Answers

- Able to communicate ideas to team members
- Has good verbal skills and ability to influence listeners
- Uses skills such as reflection, restatement, and paraphrasing
- Values humor
- Disagrees with authority when appropriate

Red Flags

- Uses slang or poor grammar
- Does not have any questions during or at the conclusion of the interview
- Offers short answers with little explanation
- Mumbles or offers incomplete answers
- Frequently misunderstands the point of questions

Conflict Resolution

Questions to Ask

- Tell me about the last argument you had with a coworker. What was it about?
- Describe a situation when someone put you in the middle of an ongoing argument. What did you do?
- Tell me about a time when you disagreed with a decision by your manager or other leaders. Why did you disagree? What did you do about it?

Positive Answers

- Reasons through multiple viewpoints
- Listens to concerns from all sides
- Works to improve situation

Red Flags

- Blames others for personal difficulties
- Consistently takes sides
- Appears passive-aggressive

Competency Question Picklist (cont.)

Critical Thinking

Questions to Ask

- Describe an organizational goal not easily applied to your office. What have you done to work toward this goal in your office's daily activities?
- Give me an example of a time when you developed or recognized new thinking or trends that were helpful to your organization.
- Tell me about a time when you had to plan a complex project.
- Think of a problem you have addressed by focusing on the underlying process rather than on an isolated event. Describe the approach you took.
- Tell me about one major obstacle you overcame in your last job. How did you deal with it?

Positive Answers

- Able to transfer ideas from one problem to another
- Learns from past successes and failures to improve performance
- Can see both the bigger and smaller pictures to address problems

Red Flags

- Appears to waffle about decisions
- Fails to see connections between similar problems

Customer Service

Questions to Ask

- Think of a time when you had to deal with an unhappy customer. Describe the situation and how you handled it.
- Have you ever had to change your approach to accommodate the needs of a customer? What happened?
- Have you ever had an angry customer who wanted you to do something that you did not have the authority to approve? How did you handle it?
- Tell me about a time when you went above and beyond normal expectations to improve a customer's experience.

Positive Answers

- Can empathize with customer needs
- Recognizes importance of service excellence
- Can show evidence of restraint under a difficult situation
- Has a mature problem-solving attitude

Red Flags

- Complains about customers
- Adheres blindly to established procedures
- Does not often volunteer assistance

Competency Question Picklist (cont.)

Decision-Making

Questions to Ask

- Have you ever had to implement an unpopular decision? What steps did you take? What was the outcome?
- Have you ever been in a seemingly impossible position with resource constraints, such as lack of staff, time, or budget to complete a project? How did you handle that?
- Describe a situation that illustrates your delegation style.
- Tell me about a hard decision you had to make and how you went about making that decision.
- Tell me about a time when you took a calculated risk in a recent position. What were your considerations?

Positive Answers

- Makes decisions without undue anxiety
- Solicits appropriate input from peers or managers
- Makes decisions based on all available evidence

Red Flags

- Makes unilateral decisions without consulting supervisors
- Procrastinates decision-making

Diversity Awareness

Questions to Ask

- Tell me about a time when you had to adapt to work with a person from a different cultural background. What did you do and what were the results?
- Give me an example of a time when communication with a customer or coworker was difficult. How did you handle it?
- Describe a situation when you worked with a person whose personal beliefs were the opposite of yours. How did you deal with it?
- Tell me about a time when you were able to step into another person's shoes in order to discover his or her unique perspective.
- Have you ever had a time when you felt it necessary to compromise your own immediate interests in order to fulfill another person's needs? Tell me about it.

Positive Answers

- Is sensitive to the feelings of others
- Makes a special effort to demonstrate respect in terms of actions as well as words
- Is adaptable to customers and coworkers with different needs, values, and opinions

Red Flags

- Expresses stereotypes or biases about people different from himself or herself

Competency Question Picklist (cont.)

Flexibility

Questions to Ask

- Give me an example of a time when you changed an opinion or action plan after receiving new information.
- Give me an example of a time when you needed to balance your needs and concerns with the needs and concerns of another person.
- Sometimes it is necessary to work in unsettled or rapidly changing circumstances. When have you found yourself in this position? Tell me exactly what you did.
- Tell me about a time when you had way too much to do and you had deadlines to meet. How did you handle it?

Positive Answers

- Able to transfer ideas from one problem to another
- Learns from past successes and failures to improve performance
- Can see both the bigger and smaller pictures to address problems

Red Flags

- Constantly justifies own actions in spite of prevailing evidence
- Appears to be consistently "hard headed"

Integrity

Questions to Ask

- Tell me about a situation in which you were called upon to keep a promise or confidence.
- Give me an example of a time when you chose to speak up for others when they were not present.
- When was the last time you "broke the rules"? Why did you do so?
- Tell me about a time when you asked forgiveness for doing something wrong.
- Share an example of a problem created for you by someone else. How did you handle it? What were the results?
- Have you ever had no control over circumstances, yet were responsible for the final outcome? What did you do? What were the results?

Positive Answers

- Takes personal responsibility for his or her actions
- Takes personal pride in professionalism
- Respects confidentiality of customers and peers

Red Flags

- Denigrates peers behind their back
- Is unable to think of situation

Competency Question Picklist (cont.)

Leadership	
Questions to Ask	
<ul style="list-style-type: none"> Describe the most striking example of staff conflict or dissent you have experienced. How did you handle it? Describe how you have involved staff in performance improvement initiatives and other decisions pertinent to their work. Give me an example of how you establish goals, responsibilities, and accountabilities for others. Tell me about a past experience developing and building a leadership team. What has been your experience in dealing with poor performance of employees? Give me an example. Have you ever had to implement an unpopular decision? What steps did you take? What was the outcome? 	
Positive Answers	Red Flags
<ul style="list-style-type: none"> Naturally assumes a leadership role Solicits input from others, both superiors and subordinates Appropriately manages expectations for self and others Is proactive in seeking problems and solutions 	<ul style="list-style-type: none"> Speaks poorly of subordinates Communicates reasoning poorly Is unable to describe making a conclusive decision

Mentorship	
Questions to Ask	
<ul style="list-style-type: none"> Give me an example of a time when you came up with a clever way to motivate your colleagues. Tell me about a time when you acknowledged or celebrated the success of yourself or others. Have you ever mentored a peer? Describe a situation when you worked with an employee or colleague to successfully improve his or her performance. 	
Positive Answers	Red Flags
<ul style="list-style-type: none"> Works collaboratively with peers Has a positive and upbeat attitude 	<ul style="list-style-type: none"> Expresses no interest in teaching Speaks poorly of subordinates or colleagues

Competency Question Picklist (cont.)

Personal Development Drive	
<i>Questions to Ask</i>	
<ul style="list-style-type: none"> Have you done anything over the past year to develop yourself? What was it? How did you go about it? Tell me about a specific goal you set for yourself in the past. Why was it important to you? How did you achieve it, and what were the results? We all get negative feedback from time to time. Tell me about a time you received feedback that indicated an opportunity for you to improve your job performance. What did you do? Have you ever been in a situation in which you made a mistake that no one else knew about? How did you handle it? Give me an example of a time when you went beyond your employer's normal job expectations in order to get a job done. 	
<i>Positive Answers</i>	<i>Red Flags</i>
<ul style="list-style-type: none"> Accepts constructive criticism Distinguishes between own efforts and contributions made by others Displays openness to developing new skills Works extra hours to accomplish task Is proud of his or her commitment to get the job done 	<ul style="list-style-type: none"> Does not seek help or ask questions of coworkers or supervisors Offers no specific examples regarding learning new tasks on the job Articulates negative comments regarding training Implies dislike of overtime Implies that money is his or her primary motivator

Problem-Solving	
<i>Questions to Ask</i>	
<ul style="list-style-type: none"> Have you ever had a time when your supervisor was away from the workplace and you had to complete a project or make a decision independently? Tell me about what happened. Tell me about a time when you thought it was necessary to alter procedure. What was the situation, and how did you handle it? We have all had projects or situations that have not worked out as they should have. Tell me about a time when this happened to you. How did you handle it? Walk me through the last big decision you had to make. What happened? Have you ever been in a situation that seemed to go "wrong" from the beginning? What did you do, and what were the results? 	
<i>Positive Answers</i>	<i>Red Flags</i>
<ul style="list-style-type: none"> Able to take action based on available information Exhibits maturity, ability to learn, and emotional control Makes good decisions even under stress 	<ul style="list-style-type: none"> Paralyzed in stressful situations Procrastinates decision-making Relies heavily on input of others Does not incorporate all available information into decision-making process

Competency Question Picklist (cont.)

Process Improvement

Questions to Ask

- Have you ever made suggestions for improving your work process? Describe what you did and how you achieved results.
- Tell me about a time when your supervisor presented you with a new process for doing something and gave you the task of implementing and evaluating that process. What did you do?
- Tell me about a time when you were faced with a situation where there was no clear policy or procedure to follow. What did you do? What were the results?
- Have there been any large changes within your current organization? Tell me about one change that affected your job. How did you react?
- Tell me about a problem that you identified and resolved by using a systematic approach.

Positive Answers

- Applies a systematic, logical, and reasonable approach to analyzing situations
- Feels confident in assuming authority
- Can function comfortably without a structured agenda

Red Flags

- Takes no responsibility for own actions
- Is unfamiliar with basic process improvement methods
- Is satisfied with the status quo

Teamwork

Questions to Ask

- Describe a situation in which you accomplished something as a member of a team. What was the team's purpose? What was your role?
- Describe a time when you were able to help a coworker solve a problem or improve his or her performance.
- What is the main strength or "natural style" that you bring to a team? Describe a specific situation and how your work style affected the team's decision.
- Give me an example of a time when you confronted a negative attitude successfully with the result of building teamwork and morale.
- Give me an example of an occasion when you have done something for others in the organization without being asked or told to do so.

Positive Answers

- Distinguishes between own efforts and contributions made by others
- Is proud of team accomplishments
- Maintains a positive attitude in light of disagreements
- Is able to appropriately resolve conflicts
- Shares critical information up, down, and across the organization
- Follows through on explicit/implicit promises and commitments

Red Flags

- Does not see benefits of working in a team
- Prefers to work alone
- Uses "I" responses rather than "we" when discussing teamwork
- Does not understand differing viewpoints
- Disparages teammates
- Unable to delegate

Component 3: Interview Note Sheet

Overview

This resource provides a place for interviewers to record notes and evaluations in a structured, easy-to-follow format. Establishing a standard evaluation template ensures a consistent methodology is maintained across interviews.

Instructions

After determining appropriate competencies using Component 1: Role Competency Selector and selecting appropriate BBI questions using Component 2: Competency Question Picklist, interview coordinators should transpose the questions, ideal responses, and red-flag information for each competency into the template on the following page. The template includes a space to record follow-up questions, interviewer notes, and a score (with included scoring guidance) evaluating the amount of evidence the candidate provided about the competency in question. Each interviewer should use the same version of the interview note sheet for each candidate he or she evaluates.

Download an editable version of this tool at eab.com/procurement-toolkit.

Sample Interview Note Sheet

Candidate Name: Nick Bulstrode

Interviewer: Mary Garth

Position: Senior Buyer

Interview Date: April 1, 2019

Competency Score Key:

1. Candidate provides evidence showing past behavior contrary to competency
2. Candidate provides no evidence of past behavior related to competency
3. Candidate provides some evidence (1–2 examples) of past behavior related to competency
4. Candidate provides significant evidence (3+ examples) of past behavior related to competency

Critical Competency	Questions	Ideal Responses and Red Flags	Interview Notes and Score
Communication	<ul style="list-style-type: none"> • Give me an example of a time you had to explain a technical concept to a non-procurement audience • Tell me about a specific experience that illustrates your ability to influence another person verbally. Feel free to use an example that involves changing an attitude, selling a product/idea, or being persuasive. 	<u>Ideal Responses</u> <ul style="list-style-type: none"> • Able to communicate ideas to team members • Has good verbal skills and ability to influence listeners • Disagrees with authority when appropriate 	<ul style="list-style-type: none"> • <i>Nick told a story about helping a faculty member understand his institution's contractual arrangement with equipment suppliers</i> • <i>Provided details showcasing how he translated technical terms into layman's terms to ensure the faculty member understood</i> <p>Score: <u>4</u></p>
	<u>Follow-Up Questions</u> <ul style="list-style-type: none"> • What did you do? • What was the result? 	<u>Red Flags</u> <ul style="list-style-type: none"> • Offers short answers with little explanation • Frequently misunderstands the point of questions 	

Interview Note Sheet (cont.)

Interview Results Summary

Candidate Name: _____ Interviewer: _____

Position: _____ Interview Date: _____

Competency Score Key:

1. Candidate provides evidence showing past behavior contrary to competency
2. Candidate provides no evidence of past behavior related to competency
3. Candidate provides some evidence (1–2 examples) of past behavior related to competency
4. Candidate provides significant evidence (3+ examples) of past behavior related to competency

Critical Competency	Questions	Ideal Responses and Red Flags	Interview Notes and Score
		<u>Ideal Responses</u>	
	<u>Follow-Up Questions</u>	<u>Red Flags</u>	
			Score: _____
		<u>Ideal Responses</u>	
	<u>Follow-Up Questions</u>	<u>Red Flags</u>	
			Score: _____

Interview Note Sheet (cont.)

Interview Results Summary (cont.)

Would you recommend hiring this candidate? ☐ Yes ☐ No

Why would you recommend this candidate?

What training would this individual need to be a successful member of this unit?

Do you have any additional thoughts or notes?

Component 4: Multi-Interview Evaluation Template

Overview

This resource provides a document to aggregate evaluations from multiple interviewers. Use with candidates that complete multiple interviews or participate in panel interviews.

Instructions

Collect and consolidate feedback from multiple interviewers in the template. After aggregating the feedback, return the completed form to the hiring manager for review. Note that where there is strong divergence of opinion, HR business partners and hiring managers may need to facilitate conversations to achieve consensus.

Download an editable version of this tool at eab.com/procurement-toolkit.

Sample Multi-Interview Evaluation Template

Candidate Name: Jarvis Lorry Position: Strategic Sourcing Manager Interview Date(s): 4/22/2019

Competency Score Key:

1. Candidate provides evidence showing past behavior contrary to competency
2. Candidate provides no evidence of past behavior related to competency
3. Candidate provides some evidence (1–2 examples) of past behavior related to competency
4. Candidate provides significant evidence (3+ examples) of past behavior related to competency

Interviewer	1	2	3	Average	Notes
Competencies					
Communication	4	4	2	4	Conversation between interviewers alleviated #3's concerns
Critical thinking	4	4	N/A	4	
Customer service	4	3	3	3	
Decision-making	4	4	4	4	
Overall Interview	4	4	3	4	
Would you recommend this person for hire?	Yes	Yes	Yes	Yes	
What additional training would he or she need?	Training on Coupa P2P suite				

Multi-Interview Evaluation Template (cont.)

Interview Summary

Candidate Name: _____ Position: _____ Interview Date(s): _____

Competency Score Key:

1. Strong evidence that candidate does not possess competency
2. No evidence that candidate possesses competency
3. Some evidence that candidate possesses competency
4. Strong evidence that candidate possesses competency

Interviewer	1	2	3	Average	Notes
Competencies					
Overall Interview					
Would you recommend this person for hire?					
What additional training would he or she need?					
Additional Notes					
Consolidated Remarks					
Was this candidate hired?					



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1

Process Automation and Redesign Tools

2

Data and Metrics Optimization Tools

3

Staffing and Organizational Development Tools

4

Customer Communication Tools

- Tool 6: Website Navigability and Comprehensiveness Audit

Tool 6

Website Navigability and Comprehensiveness Audit

Overview

This checklist provides 10 questions for procurement leaders to answer to self-assess the user-friendliness of their unit websites. Questions address customers' experiences with the website—not its technical design—so leaders can answer the questions without technical IT or web developer support. *Yes* answers suggest that websites are easy for customers to navigate to find critical policies, processes, and contact information. Leaders should work with their web staff to address design deficiencies signaled by *no* answers.

Goal

Use this audit to improve the customer-friendliness of procurement unit websites. Strategic activities such as analyzing spend data and automating inefficient workflows often yield new purchasing policies and processes. Unit-based customers must understand and comply with these policies or processes to effectively advance strategic goals. This tool helps leaders ensure that their unit websites—customers' most commonly referenced source for procurement information—document critical information in a customer-friendly format.

▶ Electronically access this tool: eab.com/procurement-toolkit

Website Navigability and Comprehensiveness Audit

Ten Checks for Your Procurement Website

Questions	Yes	No
1. Have you prioritized content with users' most-needed information at the top of the page in an eye-catching display?	<input type="checkbox"/>	<input type="checkbox"/>
2. Does your website subdivide information into categories according to audience and common customer need? (For instance, organizing content as "For Vendors" and "For Staff.")	<input type="checkbox"/>	<input type="checkbox"/>
3. Does your website clearly prioritize search fields and commonly used customer links, such as purchase order submission?	<input type="checkbox"/>	<input type="checkbox"/>
4. Does your website include basic backend design elements such as title tags and page-not-found default pages?	<input type="checkbox"/>	<input type="checkbox"/>
5. Are there consistent layouts throughout the site, especially in the use of margins, white space, and footer/header elements?	<input type="checkbox"/>	<input type="checkbox"/>
6. Does your website minimize required scrolling by keeping text succinct but informative?	<input type="checkbox"/>	<input type="checkbox"/>
7. Are there easy-to-read fonts with no more than a three- to six-level hierarchy for easy organization?	<input type="checkbox"/>	<input type="checkbox"/>
8. Have you ensured links are easy to find and descriptive, and assist in keeping text per page to a manageable amount?	<input type="checkbox"/>	<input type="checkbox"/>
9. Does your website include an FAQ—or some other medium—that presents purchasing policy information in a customer-facing format?	<input type="checkbox"/>	<input type="checkbox"/>
10. Have you tested the website with real users?	<input type="checkbox"/>	<input type="checkbox"/>



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