



Stony Brook University

PROCUREMENT ANNUAL REPORT 2022-23

Today's Teamwork is Tomorrow's Success!



Welcome

Welcome to our first Procurement Annual Report. We hope to provide insight and understanding of what procurement is and does for the Stony Brook University community and to demonstrate our commitment to providing outstanding service in all our functions.

Procurement's mission is to serve, support, and collaborate with our customers and each other so we can deliver innovative, timely, and accurate solutions that create value and streamline processes in support of the University Community's strategic priorities and objectives.

Our vision is to be a trusted full-service procurement partner and leading source-to-pay organization by creating value through strategic thinking, efficient processes, technology systems and exceptional customer care.

MEET CARMEN GONZALEZ



Carmen Gonzalez, Associate Vice President for Procurement, joined Stony Brook in December 2019. She has worked to streamline procurement operations, improve service, and lead her team towards successful implementations of the SUNY Jaggaer procurement system and the Concur expense management system. She has instituted dashboard metrics, a scorecard to track Key Performance Indicators (KPI's) and an annual customer service survey tool to improve customer satisfaction and stakeholder engagement. Prior to joining Stony Brook, she held supply chain roles with Emory University, UPS, Henkel Corporation and other multi-national corporations. She holds a B.A. in Supply Chain Management from Michigan State University and an M.B.A. from the University of Denver.

WHAT WE DO

Procurement at Stony Brook is a supply chain function integral to the operation of our institution.

Sourcing

Sourcing is tasked with purchasing goods and services, developing category management, and creating and executing strategic sourcing.

Central Services

Central Services includes Mail Services, Central Receiving, Property Control, and Archives Management. They receive materials and equipment, sort and deliver campus and hospital mail, manage thousands of assets, and perform physical inventory of capitol assets annually.

Travel

The Travel Office is responsible for travel expense reimbursements the, travel management agency and Concur system administration for both the campus and hospital employees.

Supplier Diversity

The supplier diversity program ensures that WMBE and SDVOB businesses have a full opportunity to compete for the University's business.

Contracting

Contracting engages in negotiating and developing contracts to procure goods and services at a reasonable price, on time and within the specifications to meet University needs, State and Research compliance.

WolfMart

WolfMart 360 is Stony Brook's source-to-pay e-Procurement system that allows purchasers to quickly locate and buy products and services from University contracts and preferred suppliers.

Accounts Payable

AP provides the Campus Community with efficient support for the payment of goods and services in support of the University's educational, research, healthcare and administrative needs for State, RF and LIVH.

Credit Cards

The Procurement Office offers employees credit card programs to facilitate transactions for Research Foundation (RF) and State business expenditures.



PROCUREMENT FACTS



STATE SPEND OF
\$264M
IN 22/23



RF SPEND OF
\$87M
IN 22/23



MORE THAN
40,000
PO'S PROCESSED
ANNUALLY



MORE THAN
70,000
INVOICES PROCESSED
ANNUALLY



SBU CAMPUS
SPENT OVER
\$51M
WITH 470 BUSINESSES
IN SUFFOLK & NASSAU
LAST YEAR



OUR SOURCING TEAM
NEGOTIATED
\$10M
IN SAVINGS FOR THE
SBU CAMPUS LAST YEAR



STONY BROOK UNIVERSITY
CAMPUS USED
80
CERTIFIED
DIVERSE-OWNED
BUSINESSES LAST YEAR



PROPERTY CONTROL
TRACKS OVER
21,000
CAPITAL ASSETS
FOR SBU



MAIL SERVICES
RECEIVES
\$3.6M
INCOMING PIECES
OF USPS MAIL
ANNUALLY

Procurement Office
Research and Development Campus, Building 17
Stony Brook University
Stony Brook, NY 11794-6000
E-mail: procurement_office@stonybrook.edu

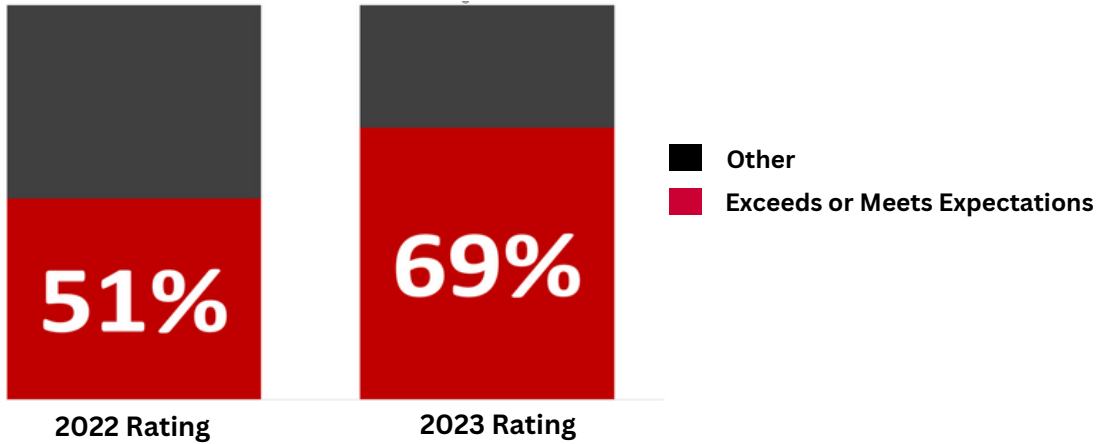
General 631-632-6010
Accounts Payable 631-632-1417
Central Services 631-632-6307
Travel 631-632-9854
WolfMart 631-632-4573

CUSTOMER SERVICE SURVEY RESULTS

Procurement has released a comprehensive customer service survey for two years in a row to all our campus stakeholders. We saw some good year-over-year improvements. Here is a summary.

Rate your overall satisfaction with 'Overall Procurement'

% of respondents endorsing 'Exceeds or Meets Expectations'



Overall the % of respondents endorsing 'Exceeds or Meets Expectations for Procurement Overall' increased from 51% in 2022 to 69% in 2023.

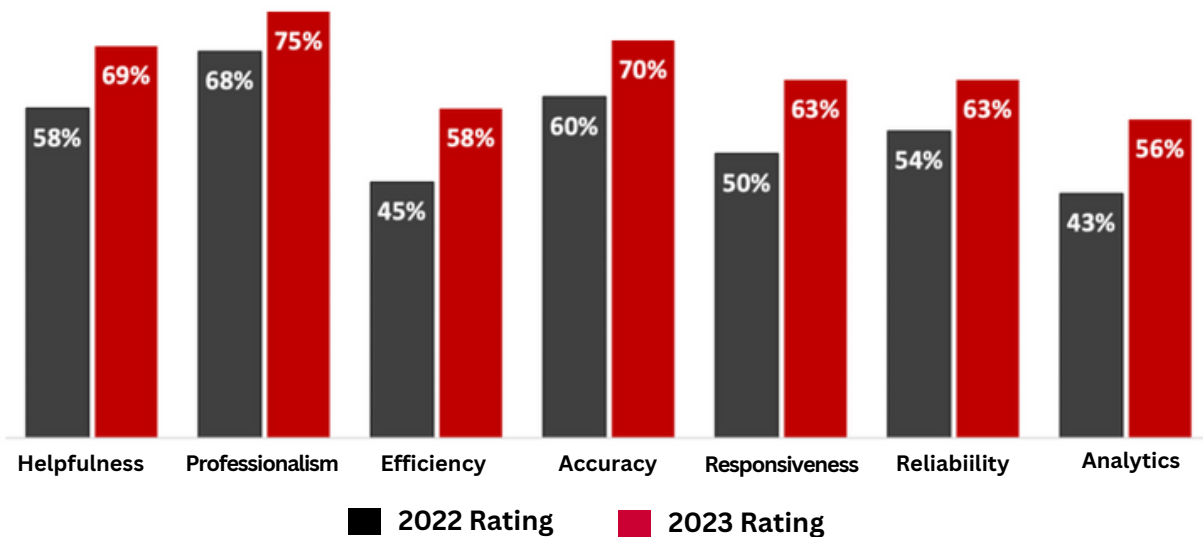
- Biggest improvement was for Travel Expense & Card Programs which increased by 19% YOY.
- Smallest improvement was for Sourcing & Contracting and Accounts Payable which both increased by 10% YOY.

Improvements in all categories of service metrics

- Biggest improvements in Efficiency, Responsiveness and Analytics.
- Smallest improvements in Professionalism, Helpfulness and Reliability.

How would you rate the Procurement team on the following?

% of respondents endorsing "Exceeds or Meets Expectations"

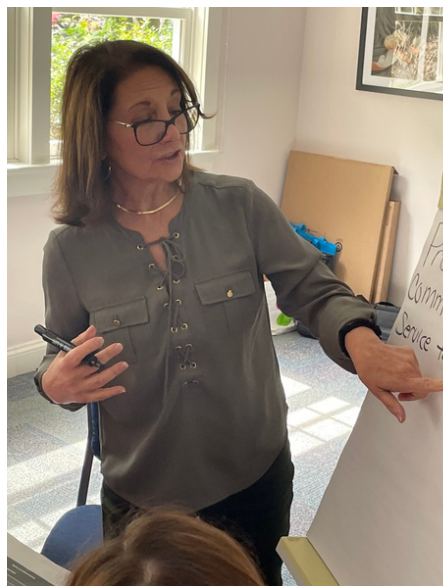
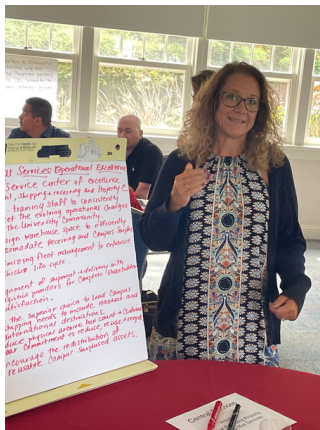


LEADERSHIP RETREAT

We held a Leadership Retreat on August 9, 2023, at Stony Brook's Sunwood property. We updated our Procurement Mission and Vision statements to ensure that we are aligned with the goals of Finance and the institution. Each team (Accounts Payable & Travel, Central Services, Sourcing & Contracting and Procurement Systems & Operations) met separately to establish goals for the upcoming year to continue to improve how we serve the SBU community.

The leadership team also completed a values exercise to discuss the culture we are trying to create in Procurement. The values chosen are below and fit well into the new values of Stony Brook University's strategic plan, 'Our Moment,' which are: **Community, Excellence, Equity, Collaboration, and Innovation.**

- **Accountability** - We accept responsibility for our own actions.
- **Professionalism** - We are qualified, skilled and committed.
- **Appreciation** - We recognize and enjoy the good qualities of someone or something.
- **Collaboration** - We believe in the power of working together.
- **Fun** - We have a friendly work environment and do not take ourselves too seriously.



TOWN HALL MEETINGS – DECEMBER 2022 & JULY 2023

We held our first Procurement Town Hall meeting on December 18, 2020. Due to the COVID pandemic, it was held virtually through zoom. It was held to celebrate the incredible work the team was doing during the challenging times in 2020.

Our second Town Hall, in June 2021, was also virtual and cleverly titled by the planning committee as “IN THE (K)NOW.” It was focused on sharing procurement updates and break-out sessions for people to learn more about the different parts of our organization. Those two inaugural sessions have continued into our bi-annual Town Halls. This past year we had our December 2022 Town Hall in the Wang Center and the June 2023 Town Hall in the Sports Complex.



PROCUREMENT LEADERSHIP SERVES ON THE FOLLOWING:

- SUNY & SBU Electronic Information Accessibility Committees
- HR Now Steering Committee
- Middle States Accreditation Steering Committee
- Risk & Compliance Owner Committee
- National Association of Educational Procurement (NAEP)



LOOKING FORWARD TO THE UPCOMING YEAR...

As we welcome the new year, we continue to focus on the goals we set at our Leadership Retreat in August as detailed below. We celebrate the efforts of every member of our team as they have embraced these goals and continue to work diligently towards them. We are committed to improving and providing outstanding service to the Stony Brook University community.

2023-2024

GOALS

- Provide a professional, solution-driven customer service experience to our stakeholders.
- Drive YOY value across all sourcing categories through process improvements, e-procurement efficiencies and innovative thinking.
- Leverage current technology, including Concur and WolfMart, and explore new solutions to improve services, systems, and processes.
- Collaborate with our Internal Procurement partners and the SBU Community to support strategic priorities and objectives.
- Improve communications and training of procurement systems, processes and regulatory compliance to the University Community.



Stony Brook
University

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Central Services