Office of Purchasing and Property Control

#9 Plan cycle - 9
Plan cycle 2023/2024
7/1/23 - 6/30/24

Introduction

The mission of the Purchasing Office is to procure and secure all materials, supplies, and services for the University's operations and to provide said items and services of proper quantity and quality at the time and place needed. This is to be done at the lowest possible cost while establishing and maintaining a reputation for fairness and integrity. The Purchasing Office operates as a service function to the entire University.

Performance Objective 1 **Perfect the purchasing process and continue to comply with the Louisiana Purchasing Procurement Rules and Regulations.**

1 Assessment and Benchmark

Benchmark: 100% of training requests will be performed with the most current information.

1.1 Data

Fiscal Year	# of training session requests	# of requested training sessions performed	% of requested training sessions performed
2019	11	11	100%
2020	77	77	100%
2021	5	5	100%
2022	3	3	100%
2023	12	12	100%
2024	7	7	100%

1.1.1 Analysis of Data and Plan for Continuous Improvement

2019-2020:
Purchasing offered campus training for Banner 9 to the campus. Purchasing invited 83 employees (the Banner system requestors) to the recommended training sessions -- 77 attended, six did not attend.

2020-2021:
Of the five requested trainings, four were for new hired employees and one was for an employee who requested a second training. Purchasing is going to offer campus refresher training sessions this year.

2021-2022:
Two new employees were trained as requestors for the Banner system. Purchasing also offered a campus refresher Banner training session and had 19 attendees.

2022-2023:
Purchasing trained 12 new employees on Banner 9 Requestor training. The Banner 9 Requestor Training document is also found on the Purchasing webpage.

2023-2024:
Purchasing trained one new employee on Banner 9 Requestor training and six existing employees were given a refresher training.

2 Assessment and Benchmark

Benchmark: 5 unauthorized purchases per year.

2.1 Data

Fiscal Year	# of unauthorized purchases
2019	0
2020	1
2021	1
2022	2
2023	2
2024	0

2.1.1 Analysis of Data and Plan for Continuous Improvement

2019-2020:

A campus department placed an order with vendor prior to receiving the Purchasing Department's approval. When the department received the invoice, they entered a requisition for payment. Purchasing was unable to process the purchase order because it exceeded the state's allowed small purchase limit; it required competitive bidding. The department had to find other means of paying the invoice. The campus department and vendor were counseled on proper University purchasing procedures.

2020-2021:
One unauthorized purchase was reported for 2020-2021. The employee wanted a reimbursement for a purchase she made without getting prior approval from Purchasing. The employee and employee's department were counseled on the proper University purchasing procedures.

2021-2022:
One employee had two (2) unauthorized purchases for printers. The employee received insurance funds for hurricane damaged equipment and thought he could make the purchases without going through Purchasing. He failed to get approval from Purchasing and from Information Technology (IT). Printers and computers must be reviewed/approved by the IT department to be sure they are supported. The employee was counseled on the proper University purchasing procedures.

2022-2023:
One employee had two (2) unauthorized purchases. The employee wanted reimbursements for purchases she made without getting prior approval from Purchasing. The employee and employee's supervisor were sent a counseling email on the proper University purchasing procedures.

2023-2024:
There were no unauthorized purchases.

3 Assessment and Benchmark

Benchmark: 20 participants in procurement card for purchasing and revise processes for accountability in a timely manner.

3.1 Data

Fiscal Year	Total # of LaCarte Procurement Cards	# of P-Cards used for Travel	# of P-Cards used for Procurement
2019	36	22	14
2020	39	24	15
2021	28	14	14
2022	28	16	12
2023	29	16	13
2024	31	18	13

3.1.1 Analysis of Data and Plan for Continuous Improvement

2019-2020:
Following the State's LaCarte Procurement Card Policy and McNeese's Procurement Card Policy, procurement card applications are accepted upon employee request and their supervisor's approval. While P-card purchases are encouraged, some employees do not apply for P-cards as there are additional rules to follow to be in compliance with the State and University policies.

2020-2021:
The number of LaCarte Procurement Cards were lower this year because of the many disasters that affected travel and campus operations.

2021-2022:
While the state encourages the use of P-cards, only those campus employees/departments who have a great need to make P-card purchases requests a P-card as there are many additional rules to follow. The Purchasing Department has a P-card which can be used for the departments who do not have a P-card.

The Purchasing P-card was used for 837 purchases for Fiscal Year 22.

2022-2023:
The number of University procurement cards for fiscal year 2023 increased by one. The Purchasing procurement card was used to process a total of 492 orders for the campus departments that do not have a procurement card -- 450 of those orders were Amazon purchases.

2023-2024:
The number of University procurement cards for fiscal year 2024 increased by two. The Purchasing department added a second procurement card for non-Amazon purchases requiring a card. The Purchasing procurement cards were used to process a total of 958 orders for the campus -- 876 of those orders were Amazon purchases.

4 Assessment and Benchmark

Benchmark: 100% compliance with policies, plans, procedures, laws, and regulations through external audits performed by the State Legislative Auditor.

4.1 Data

Fiscal Year	% compliance	# of bids	# of purchase orders
2014	100%	112	4,570
2015	100%	111	5,048
2016	100%	128	5,417
2017	100%	172	5,336
2018	100%	172	5,052
2019	100%	115	5,441
2020	100%	113	5,008
2021	100%	77	3,266
2022	100%	100	4,971
2023	100%	111	4,984
2024	100%	103	4,675

4.1.1 Analysis of Data and Plan for Continuous Improvement

2019-2020:
To ensure continued compliance, the State's policies, procedures, laws, and regulations are regularly reviewed by the Purchasing Department. Campus email and/or the McNeese portal is used to keep the campus informed of any/all new state purchasing updates or new/revised state contracts. We will continue to have the quarterly meetings within the Purchasing Department as it promotes teamwork and it seems to be beneficial in discussing purchasing updates and any campus issues.

2020-2021:
The Purchasing information on the campus portal has been down. When the campus portal is operational and available, the updated Purchasing information will be uploaded.

2021-2022:
The Purchasing webpage information has been updated and is in the process of being uploaded to our page. The Purchasing Department's quarterly meetings had stopped because of COVID and the hurricanes but will start-up again in the new fiscal year as they were found to be beneficial in promoting teamwork and in discussing purchasing updates and any campus issues.

2022-2023:
The Purchasing webpage has been updated to show the current Purchasing guidelines, procedures, and state rules and regulations. The many purchasing forms are accessible here as well as the Purchasing Directory.

2023-2024:
The Purchasing webpage has been updated to show all current guidelines, procedures, and state rules /regulations. It has also been updated to reflect the reorganization of the department staff & their respective commodities.

Performance Objective 2 **Improve property/inventory process and continue to comply with Louisiana Property Assistance Agency.**

1 Assessment and Benchmark

Benchmark: 100% compliance with Louisiana's Property Assistance Agency.

1.1 Data

2019-2020:
The 2020 Legislative audit was favorable.

2020-2021:
The 2021 Legislative audit was extended because of the Hurricane damage.

2021-2022:
The 2022 Legislative audit was extended because of the extensive Hurricane damage.

2022-2023:
The University has not been notified of when the Legislative audit will be scheduled as of July 2023.

2023-2024:
The 2024 Legislative audit was favorable.

1.1.1 Analysis of Data and Plan for Continuous Improvement

2019-2020:
The 2019 Inventory Certification was approved. State property rules and regulations are regularly reviewed to ensure McNeese's compliance with state guidelines.

2020-2021:
The annual Inventory Certification for the University is due every December. However, because of the extensive damage of the University from the hurricanes, the Louisiana Property Assistance Agency (LPAA) granted the University an extension to submit fiscal year 2021 Certification in June 2021. The University received a "conditionally approved" certification due to the high number of discrepancies. The Inventory Certification for fiscal year 2022 is still due in December 2021, only six months later.

2021-2022:
The December 2021 Inventory Certification was approved and our next annual Inventory Certification is due by December 5, 2022.

2022-2023:
The 2022 Inventory Certification was approved and our next annual Certification is due by December 5, 2023. State property rules and regulations are regularly reviewed to ensure the University's compliance.

2023-2024:
The 2023 Inventory Certification was approved and our next annual Inventory Certification is due by December 5, 2024. State property rules and regulations are regularly reviewed to ensure McNeese's compliance with state guidelines.

1.2 Data

Fiscal Year	# of items removed	Dollar value
2018-2019	650	$1,302,419
2019-2020	414	$1,056,281

2020-2021	340	$916,360.84
2021-2022	216	$398,131.13
2022-2023	589	$1,904,160
2023-2024	116	$359,443.45

1.2.1 Analysis of Data and Plan for Continuous Improvement

2019-2020:
The campus departments have been encouraged to review their inventory and complete the Property Control Exhibit 1 form to surplus any old/obsolete/broken equipment. This form is be submitted to the Property Control office. All faculty and staff are cautioned not to dispose of any inventory property without submitting this form to the Property Control office. This includes property on department's inventory listing as well as other property items costing less than $1,000.

2020-2021:
These fiscal year 2021 numbers do not include the damaged equipment from the hurricanes in August and October 2020; they are still listed on our inventory. The Property office is diligently working on updating and processing the required paperwork for the damaged, lost, and/or stolen equipment.

2021-2022:
The fiscal year 2022 numbers for deletions/pickup still do not include many of the damaged equipment from the hurricanes in 2020; they are still listed on our inventory. The Property office is having difficulty in scheduling a pickup from the state. The Property office has tagged 1,076 new items for fiscal year 2022 for a total of $3,455,056.

2022-2023:
The Property office was able to schedule pick-ups during the year to surplus 233 items to the state. The Property office received approval from the state to scrap 356 items, many of which were damaged from the hurricanes of 2020.

2023-2024:
The Property office was able to schedule pick-ups during the year to surplus 130 items to the state. The Property office received approval from the state to scrap 679 items, many of which were damaged in Farrar Hall & Memorial Gym from the 2020 hurricanes.

2 Assessment and Benchmark

Benchmark: $0 amount difference in reconciling McNeese's property records to State's property records.

2.1 Data

Fiscal Year	Amount difference
2014	$0
2015	$0
2016	$0
2017	$0
2018	$0
2019	$0
2020	$0
2021	$0
2022	$0
2023	$0
2024	$0

2.1.1 Analysis of Data and Plan for Continuous Improvement

2019-2020:
The University's property control reports and the State's property reports are continually reconciled.

2020-2021:
Fiscal year 2021 close-out was reconciled.

2021-2022:
The University's property control reports and the State's property reports are continually reconciled. The Banner Cloud migration was implemented in the middle of fiscal year close out which made the process more difficult but the two systems reconciled.

2022-2023:
Fiscal year 2023 Property close-out was reconciled with the state.

2023-2024:
The University's property control reports and the State's property reports were reconciled for the fiscal year 2024 close-out.

3 Assessment and Benchmark

Benchmark: Locate at least 99% of University's departmental inventory.

3.1 Data

Fiscal Year	# of items in inventory	# of items not located	% of University's departmental inventory located
2014	7899	101	99.99%
2015	7986	67	99.99%
2016	8220	72	99.99%
2017	8250	39	99.99%
2018	7151	87	99.98%
2019	6820	39	99.99%
2020	6545	25	99.99%
2021	6636	363	99.94%
2022	6902	129	99.98%
2023	7771	112	99.98%
2024	7568	56	99.26%

3.1.1 Analysis of Data and Plan for Continuous Improvement

2019-2020:
The University departments are to accurately perform an annual physical inventory of movable equipment in their area. This years unlocated amount was significantly less than the previous four years -- the Property Control Coordinator and campus departments did a great job! It is important for the departments to continue to review their equipment and if any are found to be old/obsolete/broken and needs to be surplussed, the Property Control Exhibit 1 form is to be completed and submitted to the Property Control office. The Property Control office should be contacted if any property tags are missing from the equipment to order replacement tag(s).

2020-2021:
With the extensive damage to the campus buildings because of the hurricanes, the physical inventories for fiscal year 2021 were very difficult to complete. Many items have been damaged, disposed of, relocated, and even some have been reported stolen. The fiscal year 2022 physical inventory is to be completed and submitted in December 2021, which should be a more accurate inventory with the buildings being re-opened and employees being back on campus.

2021-2022:

Equipment is still being located/relocated across campus because of the hurricane disruption to the University. The December 2021 inventory showed 129 unlocated items for an amount of $300,544.86.

2022-2023:
This year's physical inventories are being distributed to the campus departments in August. And while many campus departments are still displaced from the hurricanes in 2020, this year's inventories should be more accurate.

2023-2024:
Equipment is still being located/relocated across campus due delayed construction on campus. The Property Control Coordinator & campus departments are diligently working to locate missing items throughout campus.

Performance Objective 3   Administer the Professional Services Contract procedure.

1 Assessment and Benchmark

Benchmark: 100% of all professional services contracts costing $49,999 or less will follow McNeese procedures of using the requisition system.

1.1 Data

Fiscal Year	# of professional services contracts
2019	245
2020	289
2021	132
2022	205
2023	199
2024	204

1.1.1 Analysis of Data and Plan for Continuous Improvement

2019-2020:
Electronic signatures are now accepted on the General Service Contracts if the contract amount is within our delegated authority. Contracts above our delegated authority ($50,000 or above) still require original signatures to be on file per the state office.

2020-2021:
The number of contracts processed for the fiscal year 2021 was much lower than previous years due to the many disasters the University faced and campus closures.

2021-2022:
Many contracts are being submitted to Purchasing & Payroll after the service has been provided. Language is being added to the Purchasing webpage to require an explanation letter from the campus department if the contract is submitted after contract service has started. The department could be made responsible for the payment of service if the reason is not justifiable.

2022-2023:
There are now two PPCS contract forms for the University. The campus departments should use the correct form per the cost of the contract. The McNeese Service Contract #1 are for contracts less than $5,000 and the McNeese Service Contract #2 are for contracts $5,000 or greater.

2023-2024:
The two PPCS contract forms has made processing PPCS contract more efficient & significantly improved the turn-around time.

2 Assessment and Benchmark

Benchmark: 100% of all completed professional service contracts (with costs between $2,000 and $49,999) for

current fiscal year will receive a Performance Evaluation by the requesting department.

2.1 Data

Fiscal Year	# of contracts	# not returned	% of evaluations returned
2019	125	0	100%
2020	103	0	100%
2021	49	0	100%
2022	111	0	100%
2023	81	0	100%
2024	67	1	99%

2.1.1 Analysis of Data and Plan for Continuous Improvement

2019-2020:
At the end of the fiscal year, the departments with completed contracts with amounts between $2,000 and $49,999 receive reminders from Purchasing to complete and submit the required performance evaluation form(s) to the Purchasing Department for filing. This is a state requirement. For the purpose of this assessment, the current year number of contracts are shown and the previous year's results.

2020-2021:
Purchasing received 100% of the performance evaluations for fiscal year 2020 and is starting to receive the fiscal year 2021 evaluations. The number of contracts requiring the evaluations for year 2021 is only 49, a much lower number than previous years because of the campus closures due to COVID and the hurricanes of 2020.

2021-2022:
The performance evaluation form for each professional service contract is to be completed by the campus department within 60 days of completion of service and kept on file in Purchasing. Purchasing received 100% of the Performance Evaluations for the fiscal year 2021 contracts.

2022-2023:
Purchasing received 100% of the performance evaluations for fiscal year 2022 and have started receiving the completed contract performance evaluations for fiscal year 2023.

2023-2024:
Purchasing has received 99% of the performance evaluations for fiscal year 2024 and has already started receiving completed evaluations for fiscal year 2025.