California Public Higher Education Innovation Honors

**FOCUS ON EFFICIENCY**
**Abstract Achievement Awards**

*Improved Performance, Service, and Outcomes*

**Prized Abstracts will be recognized at the 2016 COLLABORATIVE BUSINESS CONFERENCE**

**Submission Deadline: September 2, 2016**

The 2016 CPHE Collaborative Business Conference planners invite you to share stories of success that demonstrate a FOCUS ON EFFICIENCY, representing innovative practices that have been implemented to improve operational performance, services, and outcomes for California Public Higher Education.

The conference will be held at the California State University, Sacramento campus October 3-5. Winners will be notified by September 9, and all abstracts will be recognized and shared on unknownsharetv.com

**Abstract should be limited to three to five pages and all of the following:**

- Project Headline
- Summary
- Abstract Brief
- Milestones
- Project Team
- Quantification & Results
- Opportunities & Solutions
- Impact & Benefit
- Quality, Cost, & Delivery
- Lessons Learned
- References (optional)
- Illustrations (optional)

More information can be found at [www.uknowledgeshare.com/2016-conference/](http://www.uknowledgeshare.com/2016-conference/)

Submit completed abstracts to [strategicinitiatives@calstate.edu](mailto:strategicinitiatives@calstate.edu)

For questions, please contact Mike Redmond, CSU Assistant Vice Chancellor, Strategic Initiatives and Support Services; (562) 951-4345 - [mredmond@calstate.edu](mailto:mredmond@calstate.edu).
CALL FOR ABSTRACTS: FOCUS ON EFFICIENCY
Submission Guidelines

<table>
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<tr>
<th>SECTION</th>
<th>DESCRIPTION / PURPOSE</th>
<th>STYLE / LENGTH</th>
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<tbody>
<tr>
<td>PROJECT HEADLINE</td>
<td>Title of project, such as <em>Spend Analytics, Smart Planner, or Campus Marketplace.</em></td>
<td>Title case (1-5 words)</td>
</tr>
<tr>
<td>SUMMARY</td>
<td>Elevator speech: This should be a succinct description of the project and its benefit to the university.</td>
<td>1-2 sentences (25-30 words)</td>
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<tr>
<td>ABSTRACT BRIEF</td>
<td>Concise but brief explanation of how/why the project began, barriers overcome, and final result. Include current state, challenges met, and conditions resolved.</td>
<td>4-5 paragraphs (275-300 words)</td>
</tr>
<tr>
<td>MILESTONES</td>
<td>A timeline focused on the turning points and key achievements. Include month and year for each.</td>
<td>List of 8-10 bullets (50-60 words)</td>
</tr>
<tr>
<td>PROJECT TEAM</td>
<td>Identify leadership, subject matter experts, and others in all campuses involved. Include name and title for each.</td>
<td>List of 6-10 bullets (40-50 words)</td>
</tr>
<tr>
<td>QUANTIFICATION AND RESULTS</td>
<td>Quantify success and explain facts evidencing achievement. Include numbers, statistics, and figures.</td>
<td>List of 6-10 bullets (40-50 words)</td>
</tr>
<tr>
<td>OPPORTUNITIES AND SOLUTIONS</td>
<td>Explanation of opportunities this project has created and next steps for the future.</td>
<td>3-4 sentences (30-50 words)</td>
</tr>
<tr>
<td>IMPACT AND BENEFIT</td>
<td>Explanation of the impact this project has had and how much better things are as a result of the changes or improvements.</td>
<td>3-4 sentences (30-50 words)</td>
</tr>
</tbody>
</table>
| QUALITY, COST, & DELIVERY | Explanation of how this project has improved Quality, Cost, or Delivery in a measureable way.  
(ex. Reduced time by 30% or reduced cost by 15%). | 1-2 sentences (10-20 words) |
| LESSONS LEARNED          | Useful information that can be applied to future efforts, and potential roadblocks that should be avoided. | List of 2-4 bullets (30-50 words) |
| REFERENCES (optional)    | Additional evidentiary support for your conclusions. Include useful references if available. | Bulleted list with hyperlinks |
| ILLUSTRATIONS (optional) | Pictures and Charts if applicable. Include exhibits, illustrations, and graphic depiction of the effort. | PDF, JPG, GIF, PNG, or TIFF. |
E-MARKET VENDOR STORE

Twelve California State University campuses are now participating in a shared e-market – a common website with a unified theme, shared training resources, negotiated vendor contracts, and transaction reporting visibility. This has reduced costs by almost 21%.

In 2014, campus users were not able to easily find contract pricing. Contracts were posted on the CSU contract store, the UC contract site, at state sites, and at consortium sites. Each of these locations required a unique login/password, and once in the site, the product or vendor had to be located and the contract language read to identify if it matched the end-user’s request.

Often the user needed to adopt the contract or join the consortium before they could use the negotiated agreement. Finally the actual order had to be linked to the identified contract in order to connect the purchase to the contract and get the pricing.

This labor intensive search resulted in users going to the internet to source and purchase items instead of using the contracts, missing the negotiated price and freight benefits altogether.

One of the initial barriers to an e-market was the effort required for each campus to negotiate and create a marketplace. Two campuses had already created standalone marketplaces (SLO and Fullerton), while several other campuses were investigating similar solutions.

The potential to expend repetitive efforts in negotiating, implementing, testing, training, and marketing an e-market were significant. Instead, Pomona invited campuses to share a common marketplace. This shared environment lowered the entry barriers for many campuses by reducing the costs, implementation efforts, vendor management, training, and marketing efforts.

The CSU prohibited interface directly with PeopleSoft. This limited a full ERP implementation and resulted in all e-market payments processed as credit card transactions. This limitation, along with the limits on campus specific customizations, led to some campuses electing not to participate.

SHOPPING THROUGH THE ONLINE E-PROCUREMENT SITE, THE E-MARKET HAS SAVED CAMPUSES AS MUCH AS 17% - 29% ON PURCHASES OF COMMONLY USED ITEMS.

MILESTONES

March-May 2014
• Campuses reviewed and discussed the potential to share a common site and common function

June 2014
• Contract signed with nine campuses participating

July 2014
• Test site launched, training program began, documentation created, initial vendors begin implementation process

August 2014
• Live site launched with ten vendors, first campus loads users

September/October 2014
• All member campuses are trained and system administrators loaded to site, more vendors added to site

November 2014
• Four more campuses load users, more vendors added

December 2014
• San Luis Obispo joins the Campus Marketplace as the tenth campus

April 2015
• 24 vendor catalogs loaded including two SB/DVBE
Opportunities/Solutions
The e-Market puts many vendors onto one site, which utilizes one login and password. The negotiated contracts from all of the purchasing entities (CSU/UC/State/Consortium) are linked directly to the e-marketplace. Users log in once to browse amongst the catalogs and pricing, checkout, and pay with a pcard. This method increases savings, improves reporting/visibility, increases compliance, and reduces inefficient practices and procedures.

Project Team - Campuses
- Cal Poly Pomona (Project Lead) - Kathleen Smith, Ruth Smith, Becky Smith,
- CSU Bakersfield - Kathy Smith, Carrie Smith, Michael Smith
- CSU Chico - Michael Smith, Sara Smith
- CSU East Bay - Chris Lam Smith, Jonathan Smith, Bob Smith
- Cal State LA - Dianne Smith, Tina Smith, Tom Smith
- Sac State - Kimberley Smith, Dale Smith, Rosie Smith, John Smith
- SDSU - Cathy Smith and BIS Support
- San Luis Obispo - Suzanne Smith Jeanette Smith, Dru Smith
- San Francisco State - Deanna Smith, Megan Smith, Nancy Smith, Stephen Smith
- CSU San Marcos - David Smith, Kerry Smith, Bella Smith

Quantification/Results
- Easy Login to access all catalogs
- Users are automatically on our contract pricing
- Consolidation of spend into specified vendors
- Pre-assigned "ship to" locations provide control
- 100% visibility to all spend
- Only State/Foundation pcards allowed
- Line item details (part numbers, descriptions, price)
- Shared responsibility in managing site and vendors
- Shared communication, training, and marketing efforts
- Shared governance: vendors, functionality, modules, etc.

Impact/Benefit
Over 1000 users have enrolled and the Spend is over $375k, with the weekly average climbing. Since the projects inception, new functionality was added including sales tax rate by campus location and transfer cart function for non-pcard users.

Lessons Learned
1. Significant outreach was required across campuses, to campus leadership, to end-users. Marketing, training, webinars, and encouragement were all required to help users migrate to the site successfully.
2. We underestimated the positive response from vendors. The participating vendors would like to offer more service, solutions, outreach, and education than we can absorb. New cross-campus teams and vendor assignments will improve our ability to respond to and promote vendor engagement.
3. Reporting capabilities require more thought and design. The information is available but recognizing and creating meaningful reports will take more effort and training. A cross campus team has been initiated on this effort.