Associate VP Business & Finance

Procurement and Payment Services

Expected Outcome 1: Copy Cat Replacement-Office Max Print
PPS will provide a solution to meet the needs of the Power Users for print services following the closure of Copy Cat.

Assessment Method 1: Power User Interviews

Assessment Method Description
In mid-January 2013 PPS was informed that Copy Cat print shop on campus was closing the end of February 2013. PPS was tasked with finding a replacement for the services previously provided by Copy Cat. Due to the short time frame PPS looked for existing contracts in place to handle AU needs due to the lack of time to conduct a formal bid process. OfficeMax Workplace was identified as a potential source of services. To determine if OfficeMax could provide print services needed by campus, interviews were conducted of the Copy Cat ‘Power Users’ to identify their needs and have OfficeMax determine if they could meet those needs. The Power Users were selected as the top departments on campus based on spend with Copy Cat. The following AU departments were interviewed by PPS (Missty Kennedy and John Corgill) and OfficeMax Workplace (Todd Miller) personnel:

- Student Affairs (Chelsea Payne)
- Housing (Rob McKinnell)
- Human Sciences (Sidney James & Sam Allbrook)
- Payroll & Employee Benefits (Teresa Coker)
- International Programs (Jennifer Mason)
- Career Center (Meaghan Weir)
- Office of Diversity (ODMA) (Sue Fuller)
- Learning Communities (Valerie Bagley)
- Enrollment Services (Angie Lane & Michael Mardis)
- AU Bookstore (Kathryn Harmon & Clint McInnis)
- Center for Governmental Services (Julia Heflin)
- COSAM (Glennelle Lindsay)
- OCM – Creative Services (Camille Barkely, Al Eiland, Pam Kirby)
- Camp War Eagle (Mark Armstrong)
- Financial Reporting (Amy Douglas, Michelle Hancock)
The following questions were asked to determine user print needs:

1. What type of print jobs have you previously taken to Copy Cat?
2. What are problems you have experienced with Copy Cat? What about these problems could be improved?
3. Overall, do you approve of the final product?
4. Will you need graphic design services or will jobs come to OfficeMax ready to print?
5. What is an acceptable turnaround time?
6. What design software do you currently use (PDF, InDesign, Illustrator, MS Word)?
7. Will you prefer a hard proof, or will a PDF proof be sufficient?
8. Has there been any problem with communication with the previous Copy Cat?
9. How split has your printing been between Copy Cat and other local, off campus vendors?

Findings
PPS and OfficeMax compiled and reviewed the responses from the interviews (see attached report). Common print needs identified from the users included:

- Ability to order stationary and envelopes
- Improved communication over Copy Cat including follow up during job production
- Quick turnaround time
- Ability to provide design services

Following review of the user needs OfficeMax Workplace determined they
could meet the print needs of AU departments. Auburn felt assured in this determination as we have an existing positive relationship with OfficeMax for office supplies and OfficeMax Workplace developed a successful on-demand print process for our ACES division.

**How did you use findings for improvement?**
In March 2013, based on review of Power User needs and determination of ability by OfficeMax Workplace to meet those needs, Auburn University implemented a campus wide contract with OfficeMax Workplace.

**Additional Comments**
PPS will conduct a follow up survey of the Power Users interviewed to determine their satisfaction with the print services provided by OfficeMax Workplace.

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**Expected Outcome 2: Purchasing Card Training**
Campus Purchasing Card end users will be effectively trained in Purchasing Card policies and procedures as evidenced by an 80% post-training test pass rate.

**Assessment Method 1: Purchasing Card Test**

**Assessment Method Description**
Purchasing Card applicants are provided with a link to on-line training provided by the Purchasing Card Program Administrator that must be completed and post-training test that must be passed prior to receipt of the card. (See attached Test) Test was developed to assess effectiveness of the training. Program Administrator reviews test results for pass/fail status with a “fail” considered missing 3 or more questions.

When you have completed the video training you will need to complete the test. You can scan and e-mail to the AU Program Administrator at griggdd@auburn.edu or mail to 311 Ingram Hall. You will be notified of any incorrect answers. Once you have 100% accuracy you will be instructed on how to obtain your Purchasing Card.

**PURCHASING CARD PROGRAM TEST**

True/False
1. The departmental vehicle can be serviced and charged to my card.  
   True or False

2. I have to reflect the FOAP on each receipt. True or False

3. I can charge airfare for an employee or student on the Purchasing Card.  
   True or False

4. I don’t have to submit an itemized invoice/receipt for each purchase.  
   True or False

5. The purchases made with my card are tax exempt. True or False

6. I can charge guest meals with the Purchasing Card. True or False

7. I can have transactions split to stay under the $2,500 capital item threshold or the $7,500 State Bid Law. True or False

8. It is my responsibility to make sure all purchases made with my card are in compliance with Auburn University financial policies. True or False

9. I can loan my card to a co-worker to make charges. True or False

10. I can charge airfare for a guest on my Purchasing Card. True or False

11. I can charge our maintenance or service agreement for a copier to the Purchasing Card. True or False

12. I am responsible for obtaining an original itemized receipt for my purchase. True or False

13. We need to rent tables and chairs for a business function we are having – that can be charged to the Purchasing Card. True or False

14. The reconciler/administrator for my department has a deadline to submit the Reconciliation form and receipts for all Purchasing Card charges for my department. True or False

15. If a vendor charges me tax I don’t say anything. True or False

16. My Purchasing Card is lost or the number is compromised so I need to contact the AU program Administrator. True or False

17. If there is a charge on my statement that I did not make I do not need to do
anything. True or False

18. When I leave the University I need to turn my card into the approving official in my department and it needs to be cut in half and attached to the Purchasing Card Maintenance form and sent to the AU Program Administrator. True or False

19. I can purchase items from any vendor even if they are on contract with another vendor and will not be required to supply additional information. True or False

Multiple Choice

1. What is the dollar limit per transaction that will not require a requisition be processed?
   a) $7,500
   b) $5,000
   c) $2,500
   d) $1,000

2. What should I do with receipts after I make a purchase?
   a) put in file
   b) turn in to the approving official for my department
   c) list FOAP on receipt
   d) both B & C

3. If I purchase fuel for a state car what additional information is needed?
   a) travel destination listed on receipt
   b) mileage from odometer
   c) state tag number listed on receipt
   d) list of people traveling

4. Why would charges on your card be declined?
a) over monthly limit  
b) MCC code blocked  
c) over single transaction limit  
d) all of the above  

5. Is there anyone on Campus that I can contact if I have any problems with my Purchasing Card?
   a) yes – AU Program Administrator in PPS  
   b) yes – departmental approving official  
   c) no – you are on your own  
   d) yes – your supervisor

Findings

330 purchasing card applicants were tested in fiscal year 2013. The finding noted that 325 passed resulting in a 98% pass rate which meets/exceeds the desired outcome.

How did you use findings for improvement?

Based on the finding, training found to be effective.

Additional Comments

No need to make changes to the training program at this time. If failure rate increases, training will be reevaluated.

Expected Outcome 3: Remanufactured Toner Initiative
Raise campus awareness and buy-in of the use of remanufactured toner.

Assessment Method 1: Introduction of the Remanufactured Toner Initiative - Survey

Assessment Method Description
In support of sustainability and cost saving efforts by AU, PPS and OfficeMax
(AU's office supply vendor) set as a goal increasing the use of remanufactured toner by campus departments. The first step in this process was introduction of the initiative to campus. PPS and OfficeMax prepared a presentation for a pilot group of campus toner purchasers. OfficeMax provided information through AU's purchase history for fiscal year 2013 identifying which individuals were purchasing toner cartridges, the type of cartridges purchased, and potential savings from use of remanufactured toner (spreadsheet attached). From the report, the top 25 individuals in spend volume were selected as the pilot group. In January 2014 Scott Titshaw with OfficeMax and Beth Owen with PPS met with the individuals in the pilot group to introduce the program and provide cost savings data that could be recognized from the use of remanufactured toner based on the fiscal year 13 spend history. A survey was provided in March 2014 to the participants to determine if the initiative introduction correctly conveyed the program goals using the following questions (survey attached):

1. Was the dollar savings of a switch to remanufactured toners for your department and the University clear? Yes/No
2. Was the environmental impact of switching to remanufactured toners discussed? Yes/No
3. Were you advised of their "no risk/100% satisfaction guarantee" as it relates to product quality? Yes/No
4. Were you advised that all OMX remanufactured toners are manufactured to meet or exceed the output of name brand toners? Yes/No

Of the 25 participants from the meetings, 11 responded to the survey. The respondents overwhelming answered 'Yes' to the questions. Only 1 of the 11 responses indicated 'No' for questions 2 - 4...all other responses to the questions were 'Yes'.

**How did you use findings for improvement?**
Based on responses from the respondents, the messaging provided in the meetings to introduce the remanufactured toner initiative did convey the focus of environmental/sustainable efforts and cost savings opportunities. A similar message will be used when introducing the initiative to a broader campus audience.

**Additional Comments**

**Assessment Method 2: Remanufactured Toner Future Purchases - Survey**

**Assessment Method Description**
A large focus of the remanufactured toner initiative is to move spend away
from new toner to remanufactured toner to achieve environmental and cost saving goals. In an effort to increase success of this focus, a product sampling was provided to the pilot group identified above in Assessment Method #1 during the initiative introduction. In March 2014 following the sampling pilot program, PPS and OfficeMax provided a survey to the participants to determine their satisfaction with the product and gauge their interest in ordering remanufactured toner in future purchases (survey attached). The following questions were asked of the participants:

1. Did you agree to try the OMX remanufactured toners to confirm the price and quality? Yes/No
2. Have you placed one or more orders for OMX remanufactured toners since the visit? Yes/No
3. What was your satisfaction with the performance of the OMX remanufactured toners that you purchased? (scale of 1 [not acceptable] - 10 [performed as well as name brand])
4. Will you continue to support this cost savings and environmental initiative by purchasing OMX remanufactured toners where possible?
5. If you have any comments pertaining to this survey please express those below.

Findings
The survey revealed that 64% of the respondents agreed to participate in the sampling program. Of those participating in the sampling program, 86% experienced a high level of satisfaction with the toners and indicated they would continue to support this initiative with future purchases of remanufactured toners.

Those respondents who did not choose to participate in the sampling program voiced strong concerns regarding use of remanufactured toner based on previous experience.

How did you use findings for improvement?
While the findings indicated satisfaction from those who participated in the sampling program, the comments from those who did not participate were concerning. Though an overwhelming majority of the respondents indicated the correct messaging was providing regarding the initiative as evidenced in the Findings for Assessment Method 1, the messaging did not appear effective in convincing those with unsatisfactory past experiences with remanufactured toner to give the product another try...therefore we could potentially fail in achieving the overall environmental and cost savings goals.
PPS will reach out to the Office of Sustainability and ask if they will partner with our office and OfficeMax on this initiative. The thought being that Sustainability could assist in effectively crafting the initiative messaging to successfully introduce the program to campus and drive future spend to remanufactured toner.

Additional Comments
Since this initiative was launched in early 2014, OfficeMax has merged with Office Depot and Mr. Titshaw is no longer with the company. The new management team decided to put the remanufactured toner project on hold. During our next quarterly business review with the vendor we will revisit this initiative.

Expected Outcome 4: Satisfaction with OfficeMax Print Contract
The OfficeMax print solution is meeting the needs for print services with a 70% satisfaction rate with campus users. This is a follow up item from the PPS 2012-2013 Assessment report in which the OfficeMax contract was put in place following interviews with campus Power Users of print services.

Assessment Method 1: Campus User Survey

Assessment Method Description
In March 2013 Auburn University entered into a contract with OfficeMax Workplace to provide print services to campus. This followed closing of the Copy Cat print shop on campus in February 2013. After conducting interviews with Copy Cat 'Power Users' to ascertain their needs, it was determined that OfficeMax Workplace could meet those needs and the contract was implemented. PPS and OfficeMax followed up with campus units in March 2014 with an on-line survey to determine if in fact the service provided was meeting their needs.

The survey produced 35 responses, representing 61% of the Power User departments initially interviewed. In addition to the Power User departments, several high volume users of the contract participated in the survey. The following provided responses:

- Student Affairs (Priscilla Little)
- Human Sciences (Samantha Allbrook)
- Payroll & Employee Benefits (Teresa Coker)
- International Programs (Jennifer Mason)
- Career Center (Meaghan Weir)
- Learning Communities (Valerie Bagley)
- Enrollment Services (Michael Mardis)
- COSAM (Helen Kirk, Carol Nixon)
- Camp War Eagle (Mark Armstrong, Taylor Kamin)
- Budget Services/Financial Reporting (Bryan Elmore)
- Human Resources (Kelli Henderson)
- Alabama Technology Network (Seth Humphrey)
- Recruiting (Mary Ruth Smith)
- Office of Professional & Cont Ed (Danell LaPread)
- Donor Relations (Jill Saucer)
- Pharmacy (Jennifer Johnston)
- PPS (Susan Salheiser)
- Provost (Lavelle Bledsoe, Kathi Palmer)
- Agriculture (Billy Earle, Joe Giambrone, Sheila Holt)
- Vet Medicine (Debbie Allgood, Joni Coffman, Teri Dunaway)
- Engineering (Michelle Alviar, Linda Allgood)
- Communication Disorders (Angela Head)
- Undergrad Studies (Paula Clark)
- ATAC (Nicole Merritt)
- Latresha Brady-Pinkston (ACES)
- Melanie Cosby (Contracts & Grants Accounting)
- Anonymous

The following questions were asked to determine user satisfaction with quality and turn around time, see [https://www.surveymonkey.com/s/P8DTK95](https://www.surveymonkey.com/s/P8DTK95) for the full survey:

- How would you rate the service on a scale of 1-10, with 1 being unacceptable?
- How would you rate the quality of work on a scale of 1-10, with 1 being unacceptable?
- Has the turn around time been acceptable for your orders? Yes or No

**Findings**

PPS and OfficeMax compiled and reviewed the responses from the survey. The following results were noted, individual responses are available upon request:

- Response to the question "How would you rate service" yielded an average rating of 6.94 with 23 respondents rating the service at 7 or greater.
- Response to the question "How would you rate the quality of work" yielded an average rating of 7.79 with 27 respondents rating the
service at 7 or greater.

- Response to "Has the turn around time been acceptable" yielded a Yes response from 23 respondents for a response percentage of 69.7%.

These findings revealed that we are right at the target satisfaction rate of 70% with the print contract.

**How did you use findings for improvement?**

Given that the target satisfaction rate of 70% was just barely achieved for overall service and turn around time, there are many opportunities for improvement in these areas. PPS will continue to work with OfficeMax to address concerns and needs noted in the survey to increase customer satisfaction with the contract. All of this information will be retained for use when this contract ends and a bid solicitation is issued for print services.

**Additional Comments**

**Expected Outcome 5: eTravel Voucher System**

PPS will gain insight into eTravel Voucher rejections from monthly statistical data to determine if system modifications can be developed to reduce the reject rate

**Assessment Method 1: Analysis of Statistical Data**

**Assessment Method Description**

In March 2013, PPS began receiving statistical data related to eTravel Vouchers processed through Banner SSB. The 1st report in March provided data going back to the beginning of the fiscal year, 10/1/12, and going forward the report is provided on a monthly basis. In reviewing the monthly reports PPS was alarmed by the high reject rate noted for eTravel vouchers (see attached for analysis of reject rates for fiscal year 2013, 1st tab on spreadsheet). PPS requested and received the reasons noted by the PPS auditor for the rejects (see attached for listing of reasons for reject, 2nd tab on spreadsheet). The reasons for rejects were analyzed and grouped to determine the highest percentage of reason for reject.

**Findings**

In reviewing the reasons for reject, it was noted that the following represented 21% of the eTravel rejects:
- Failure to attach Conference/Meeting agendas
- Failure to attach RAT 50 Form (Request for Authority for International Travel)
- Failure to attach copies of credit card statements for airline ticket purchases

**How did you use findings for improvement?**
PPS staff met with IT staff to determine if modifications could be made to the eTravel system to alleviate the high rate of returned vouchers for failure to attach the documents noted above. The system was modified in August 2013 to allow for attachments of documents mid-process without the need to reject the voucher. PPS audit staff (Bonnie Sumlin, Charleen Thomas, Vicky Smith, Wendy Sheen, and Jennifer Lashley) were trained on the appropriate use of the system modifications through a staff meeting conducted by Debby Miller and the attached eTravel Voucher Enhancements user guide was provided. The system enhancements were communicated to all eTravel Voucher users via e-mail communication, see attached.

**Additional Comments**
Reject rate is shown to have decreased for the month of September 2013 (see attached, 1st tab on spreadsheet) following system modifications. PPS will continue to monitor reject rates and if rates increase, will implement additional training.