

## BUSINESS CONTRACTS FOCUS GROUP MEETING

**Scope:** The discussion in the focus group was focused at Business Contracts that has come over to Purchasing.

**If you could change one thing about the Business Contracts process, what would it be?**

VOTES	IDEAS:	EXPLANATION:
5	Take inventory of all contracts we do, and see if we can delegate some.	Take inventory of all contracts to see if we could delegate anything directly to the departments.
4	BARD E-Doc	Make BARD an E-Doc
4	Consistency in how analysts deal with contracts <ul style="list-style-type: none"> <li>- follow up</li> <li>- negotiation</li> <li>- mail - communication</li> </ul>	Consistency in how Analysts deal w/each contract. Better communication consistent in negotiation of terms and same manner of follow up for each.
3	Single point of contact (or everyone over there has access to the same info)	A single point of contact per department or everyone has same information at Business Contracts.
3	Quicker turnaround. Expect a couple of weeks.	Quicker turnaround should not take 4-6 weeks on hotel space / lose space before you get the contract.
3	Map of which unit to go to – BC Purchasing RE Research and which staff...	Map the process so you know to go in the right place the first time would save time.
2	Contact w/analyst. Analyst let you know they are processing contract.	Contact from Analyst who is handling your contract so you know whom to contact if changes.  We now deal exclusively w/performance documents and at that point everything got better.
2	Online access to information – search, status, last action	Information via online showing current status <ul style="list-style-type: none"> <li>- in negotiation</li> <li>- mailed back to client</li> </ul> (if no response in two weeks, we would no to follow up)
2	Analysts specialize in type of contract.	Don't know how work is divided, but our work is basically the same dealing w/community colleges, but they get assigned to different analysts.
2	Simple checklist for Analyst to make sure little steps don't get overlooked like letting departments know you're sending out signed hard copy.	Suggest using a checklist: FIRST STEP... I have the contract LAST STEP... I've sent the contract
1	Checklist for departments <ul style="list-style-type: none"> <li>- what can we do to help</li> <li>- when do we follow up</li> <li>- documents to be submitted</li> </ul>	A checklist so we can make their job easier telling what they need and what documents we must submit.
1	Someone that specializes in events – short turnaround – extremely responsive.	Have an extremely responsive person who specializes in events.
1	A little flexibility – specialized person for unique contracts that span functional areas – RE, BC, etc.	More flexibility in new system. A specialist for quick turnaround programs that don't fit a niche / can't divide between Analysts.

1	Merge bidding and contract process	Ability for the contract analyst to bid (i.e., merge the consulting and bidding).
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	BARD may be too streamlined, e.g. scope box is tiny.	BARD may be too streamlined.
1	More Analysts-staffing	More business analysts / more staffing.
		Not only tell us where it goes, but communicate to their staff where.
1	Revisit division of labor in reorganization.	Revisiting of division type and labor. I'm concerned they're short w/comparison to volume after reorg.
	Tracking mechanism that will keep track of all contacts on an agreement.	I deal w/clients who get Public Assistance (Section 8) and it would be nice if the last communication was kept in file so there was a tracking mechanism either E-doc or hard copy in file.
	Consistency on non-disclosure agreements.	Consistency in non-disclosure agreement so each analyst handles the same.
	Coordination of consultation w/OP - when it needs to go or not - who to	Coordination in consultation w/OP so we know when and when not to go to OP. Look at parallel reorganization with OP.
	Reasonable response time to calls/emails. Some kind of standard that's communicated to customers.	Reasonable response time to emails and phone calls (1-2 days) and standard communication to customer.
	Staff using "out-of-office" capabilities of email and voicemail.	Analyst and staff put on their email and phone when they are out and when they will return.
	Retainer for specialists of contracts where analysts lack expertise - Ex: telecommunications	Have experts in areas (Ex: FCC regulations) have a retainer for those lacking experience.
	Clarification of who is responsible for making sure department gets signed copy.	Revisit mechanism to ensure we get signed copy of the agreement back.

**A satisfying Business Contracts process is one that is...**

	Clear	Clear
4	Efficient	Easy to understand and efficient
9	Processed in a timely manner	Processed in a timely manner
2	Easy to train staff	Easy to train your staff
4	Easy for vendor	Easy for vendor to understand and follow
1	Team Effort	User friendly w/team effort between dept and analyst
6	Hassle-free	Hassle free
	Learning Experience	A learning experience where we learn every time we go through the process.
	Automate routine work	Document the repetitive processes and automate the routine work.
9	Computer-linked	Computer-linked
1	Documented/reference	References and documented for people just starting.

**A satisfying process does not result in... (BAD)**

Headaches	
Combativeness	

Workarounds against policy	
Confusion	
Delays	
Bad experience for vendor	Bad vendor relations
Errors	
Loss of Resources	
Wasted staff time	
	Doesn't encourage cheating

**What does a good process look like?**

Processed in a timely manner whatever is consistent to the situation. Some take longer; routine ones should take less.
Communication on what should be expected and time allotted
When a new project comes in it should be preliminary reviewed for things: <ul style="list-style-type: none"> <li>- all components are there</li> <li>- establish X number of weeks or months so frame of reference</li> <li>- assign an analyst and contract number</li> <li>- some mechanism so we could look online at actions and progress.</li> </ul>

**What would computer linked look like?**

Electronic BARD so you can send backup material or contracts we've received.
Has their name, phone number and email address.
Ability to pull up information on every contract (but, how do we control access?)
Develop something linked to DaFIS
(Yes, exclude Office of Research contracts.

**What does hassle-free mean?**

I'm the customer; they provide the service.
They complain, air dirty laundry, don't bother me, I'm having a bad day (professionalism)
Four years ago Univ Ext met with Business Contracts and set up gatekeeper. All communication goes through Laura. Stated she gets great service this way.
UC Davis Presents agreed. Single point of contact work well for dept.

**What does efficient mean?**

This is where gatekeeper would really help so you can see...
Gatekeeper.
Not sure all departments would want a single point of contact.
BC could not legislate.

**What is "easy for vendor?"**

We sent a memo to vendor telling them what to expect. It worked well. We had to do this to smooth the way for the vendor so we get the vendor back from year-to-year.
Like a brochure, no overkill
Maybe a checklist

Someone initially makes contact w/vendor but they may not hear again until show up.
Every vendor has different level of sophistication.
Analyst kicks any conflict w/vendor back to department to smooth over.
If speaking "lawyer" remember human piece especially when dealing with little guy. Less black and white.

**Do you think you will find it difficult to determine where contracts go... are you going to be able to figure out?**

They're supposed to communicate if we send it to wrong place.
We're going to have to train our staff.
If we could merge contract and bidding this is where it would help.
We have some that go between Real Estate and Purchasing and Business Contracts and I don't know how you'd ever pull them apart.

**What are other ways to clarify?**

Communicate what is the priority (Ex: Real Estate versus Business Contracts)
There needs to be a lead unit that then hands off.
I commend Ken's leadership, but so much is happening; we were in the unassigned for a while until management decided to reorganize.

**Of the online resources, what have you used and what has been helpful?**

Used to download BARD only.
Email has been most helpful.
This is place we could put a checklist.
Staff or I fill out BARD.
If checklist, might be easier for more to do it.
Some BARDs have to be signed by Director; seems like low value ones could be delegated down.

**If user-friendly online guide, would you use it?**

Absolutely, yes, in order to not wade through the list, but to see a pick list.
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**What else would you like to see in the online systems?**

Links to the policies.
Contacts / who's the specialist with each type of contract.
Memo template to vendor.
Tracking form.

**Is the current revenue and expense component clear to everyone?**

Clear only now because we are experienced. Learned about caps, waiver process. Sharing this information would be helpful. (EX: leases – Accounting does not set up properly to know how much you've spent.)
Some of the unusual types of things could be in the guide.
Extramural Accounting needs to explain the invoicing process.

**If we added a Business Contracts module in DaFIS would it help?**

Yes, to template and would help in workflow routing.

**How about a BC requisition in DaFIS?**

Yes, if it assigns number and helps us out.

**Do all those filling out the BARD have DaFIS access?**

Yes.

**Does any faculty fill out the BARD and need access?**

No.

**How did you learn?**

Phone calls.
On the job training.
P&P
BC class is very general overview
Sat through 4 hours grants class and instructor could still not.
Karen Hull PPT was incredibly helpful on the module changes.

**Would classroom training segmented around different contracts be helpful?**

Yes, maybe via online computer lab to hands-on would do it.
Like the DaFIS labs would also be helpful.
A help question online.
A help desk would be very helpful because if you call you're slowing your process and theirs.
A FAQ's on web but need them by topic.
Used to have a receptionist that helped a lot but she's gone now.
Think they're relying on temp pool now.

**What else would be beneficial?**

That meeting we had was very helpful.
How was it announced, I didn't get it.
I got it by a couple of emails.
An HR person told me.

**What kind of BARD info would you like to see on the online tracking system/report?**

Ability to search by client name or department.
Analyst assigned.
Last action.
Expiration date.
Progress payments made.
Instead of renewal notices, an email asking us to check status
Email link to the assigned analyst.
Other contract samples to help us.