

Dollars & Sense

Summer 2016

Northwestern | FINANCIAL OPERATIONS
Procurement and Payment Services

Northwestern University's Annual Preferred Vendor Expo

Join us for the 2016 Northwestern University Procurement and Payment Services (PPS) Preferred Vendor Expo! The Evanston campus show will take place on Wednesday, August 24, and the Chicago campus show will be on Friday, August 26.

Evanston Wednesday, August 24, 2016, 11:00 a.m. – 2:00 p.m.
Lab Vendors: [Pancoe Pavilion](#) – 2nd Floor
All Other Vendors: [Norris University Center](#) – Louis Room

Chicago Friday, August 26, 2016, 11:00 a.m. – 2:00 p.m.
All Vendors: [Lurie Center](#) – Atrium (west end)

The Preferred Vendor Expo is a great opportunity to meet our Preferred Vendors, connect with high-quality product and service providers, and discover cost-effective solutions to make your job easier. You will gain product knowledge and information from Preferred Vendors and network with faculty and staff. From software and office supplies to travel and shredding services, you'll find it at the Preferred Vendor Expo.

Attendance for the Preferred Vendor Expo is free and no registration is necessary. So stop by, meet Northwestern's Preferred Vendors, sample products, and walk away with new ideas and information to save time and money! Make sure to scan your Wildcard at the check-in desk to be eligible for this year's prize drawing!

If you have any questions about the Preferred Vendor Expo, contact Samantha Kustra, Procurement Analyst, at 847.467.0839 or s-kustra@northwestern.edu.

FISCAL YEAR END KEY DATES



August 31, 2016

This is the last day for FY16 Requisitions to be approved and sourced into POs. Any Requisitions that have not been approved and sourced by 6 p.m. will be cancelled and closed.



September 1, 2016

FY17 opens for the creation of Requisitions for goods and services to be received in the new fiscal year. Any Requisition created on or after this date will default to FY17. This is the first day to submit new Blanket Requisitions.

BEST PRACTICES: DESCRIPTIONS WHEN ADDING A NEW VENDOR

When requesting a new vendor code in NUFInancials, independent contractor and supplier requests require a detailed explanation in the Description of Purchase or Payment field. Descriptions such as "lab supplies" are too general. Key words indicating what is being ordered and justification for why a new vendor is being requested. Is this a custom product? Do any of our Preferred Vendors that are already in the vendor database carry this product? Additionally, certain payments to foreign vendors may trigger tax withholding, so a detailed description is essential.

A description is also needed when requesting payment to independent contractors. "Honorarium for speaking at meeting of Young Scientists of America" is more helpful than simply "Honorarium". Not sure about your description? Please call the VFM helpline at 847.491.4707 or email vendorprocessing@northwestern.edu for assistance.

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Northwestern | PROCUREMENT & PAYMENT SERVICES

Vendor File Management • Purchasing • eProcurement • Accounts Payable • Procurement Card • e-Payment • Shipping/Receiving and Services

PPS News & Updates

Our Case for Business Diversity

At Northwestern, one of our objectives is to inspire the growth and development of small businesses. We strive to be a leader in the Evanston and Chicagoland communities in helping to make small businesses stronger through procurement, supplier development, and the Wildcard Advantage Program.

Procurement and Payment Services is in the first phase of implementing our Procurement Diversity strategy. We understand that diversity is important to all aspects of our institution. It is highly important that our faculty, staff, students, alumni, and suppliers understand our policies, procedures, and procurement protocols. We are currently creating communication tools and systems to support our diversity objectives.

Our business case contains three very important elements and is the foundation for this initiative. It will lead us as we create opportunities for small businesses. The elements of our business case will:

1. Connect us to the Evanston and Chicagoland communities by demonstrating good citizenship, which can lead to the creation of jobs and the sustained economic viability of the community;
2. Make Northwestern an attractive university to attract faculty, staff, and students, as well as build stronger relationships with alumni; and
3. Enable us to work with smaller suppliers that will help drive competition, innovation, high service levels, and new ways of thinking throughout our university.

Our business diversity efforts in Procurement and Payment Services will focus on efforts that bring impact to Northwestern and the Evanston and Chicago communities. In order to deliver on our objective, we need your help.

- Consider small businesses when you are procuring goods and services
- Partner with Procurement and Payment Services to identify diverse businesses
- If you are already using a good small businesses, please let us know

For more information, please contact Gwendolyn F. Turner, Director of Procurement Diversity, at 847.467.6333 or gwendolyn.turner@northwestern.edu.

P-Card Program Transitioning to One Card

In late January, Procurement and Payment Services implemented My Wallet to streamline the processing of Procurement Card transactions through the use of the existing expense report process. This new process provides improved transparency and controls associated with purchases made using the Procurement Card.

The next step we will undertake is to transition the Procurement Card program to the 'One Card' program. We are pleased to announce that as part of this implementation, we are working with our card provider, JPMorgan Chase, to transition to chip and PIN cards. A chip transaction adds another layer of security to cards by requiring the chip to produce dynamic data (a unique code) for every chip transaction, further protecting the card from unauthorized use.

The week of July 25, we will begin converting all current cardholders to chip and PIN cards. Your chip card will have a new number and you will need to establish a PIN number to be entered when using it. **More details will be sent out to cardholders the week of July 11.**

Please ensure all outstanding transactions are reconciled on an expense report prior to July 25 in order to receive your new chip and PIN One Card. As instructed in My Wallet training, it is vital that all card transactions be reconciled on an expense report and approved within 30 days after the transaction occurs. We will begin sending emails to cardholders with transactions remaining in My Wallet for more than 30 days beginning July 15. Cardholders who have transactions in My Wallet for more than 90 days risk having their account suspended until the transactions are processed on an expense report. If you have any questions, please contact Mary Hallissey at 847.491.5340 or m-hallissey@northwestern.edu.



Annual Free Document Shredding Event

You are invited to participate in Northwestern's annual free document shredding event on July 19th and 20th. Join your fellow university community members in safely disposing of your confidential paperwork in an environmentally responsible way. All shredded paper is recycled to help conserve natural resources.

Northwestern's Preferred Vendor for document destruction, Shred-it, will be onsite with document drop-off trucks posted at convenient locations on each campus where you can bring sensitive materials from your school or department for free shredding. Items may or may not be shredded on site, depending upon the drop-off location and truck type. Below are more details on the two-day event:

Chicago Campus : Tuesday, July 19

- 11:00 a.m. to 12:45 p.m. Rubloff Dock
(entrance on Superior)
- 1:15 p.m. to 3:00 p.m. Tarry Dock
(entrance on Fairbanks)

Evanston Campus: Wednesday, July 20

- 11:00 a.m. to 12:45 p.m. 720 University Place;
2031 Sheridan Road
(outside Shanley Hall)
- 1:15 p.m. to 3:00 p.m. Norris University Center
Dock; Circle Drive (just
east of Annenberg Hall)

Please note the following prior to shredding your documents:

- All items for shredding must be from a Northwestern school or department. Personal documents will not be accepted.
- Documents that must be retained for legal reasons (e.g., a litigation hold) or per Northwestern's preservation policies should not be shredded. Contact Senior Associate General Counsel Amy Mayber at 847.491.5609 if you have questions.
- Review Northwestern's [Retention of University Records Policy](#) and its appendix for more information and guidance as you determine what to shred.



If you have more frequent shredding needs, please contact James Moscrop with Shred-it at 847.205.5801 or james.moscrop@stericycle.com, to arrange regular service at a competitive rate. Visit [Shred-it's Preferred Vendor page](#) to find out more about pricing for Northwestern.

Contract Management Module To Be Implemented

As you may be aware, Northwestern has undertaken a project to implement a new Supplier Contract Management module in NUFinancials. A top FY16 priority of the Finance Advisory Committee, this project will improve service and reduce risk by creating a consistent and efficient process to review and sign contracts, as well as establishing a single, central repository for all supplier contracts.

Among the benefits of the new Supplier Contract Management module are:

- Designated users will have the ability to create contracts using pre-approved, Northwestern-specific templates available in a document library.
- Contracts can be submitted for collaboration with other stakeholders within a department or school.
- Key units such as Office of the General Counsel, Procurement and Payment Services, Risk Management, Northwestern IT, and Treasury Operations will be automatically included in the review process when appropriate.
- Seamless integration with NUFinancials means that most users will be working with an already familiar system.

A pilot will begin this summer, with full roll-out to other departments and schools beginning in 2017 based on unit readiness. Please watch for more information later this year with more details regarding how to prepare your unit to take full advantage of this improved way to create, review, submit, and maintain contracts. If you have any questions, please contact Jim Konrad at 847.491.8121 or j-konrad@northwestern.edu.

New Contracts

New Stationery Preferred Vendor

Procurement and Payment Services recently issued a formal Invitation to Bid (ITB) for Stationery Products (e.g. business cards, envelopes, letterhead). We received bids from 16 individual vendors. The Evaluation Committee consisted of University Relations, Global Marketing, and PPS. **Active US** was determined to represent the best value to Northwestern.

This new contract will support the new branding recently established by Global Marketing and University Relations. The new contract is expected to begin September 1, 2016. A catalog will be included in iBuyNU to streamline the process of ordering stationery items.

If you have questions, please contact Sheila Watkins, Procurement Administrator, at 847.491.8125 or at s-watkins@northwestern.edu.



New Furniture Preferred Vendors

Procurement and Payment Services is pleased to announce we recently completed an extensive bid process for office furniture. Three primary Preferred Vendor contracts have been awarded. The three vendors below will be considered for projects requiring new furniture:

Herman Miller (new)
 Dealer: Interior Investments
 Ellen Buckman
 312.212.5118
ebuckman@interiorinvestments.com

Allsteel (re-awarded)
 Dealer: Henricksen
 Sandra Gagliano-Cadas
 630.875.1038
s.gagliano@henricksen.com

Haworth (re-awarded)
 Dealer: Kayhan
 Eva McFadden
 847.843.5075
eva.mcfadden@kayhan.com

In addition to the key manufacturers each of the dealers represent, they can also supply a wide range of products from ancillary manufacturers with special Northwestern discounts, such as lounge area seating, stack chairs, marker boards, and sit-to-stand units.

For departments and schools looking specifically to match or replace any Steelcase products, a second-tier contract has been established with Forward Space (dealer for Steelcase product). If you need to purchase Steelcase furniture to match existing Steelcase furniture that you already have, please contact:

Forward Space
 Susan Flaherty
 312.563.5248
sflaherty@forwardspace.com



Any questions related to these contracts can be directed to Laura Norton, at 847.467.3345 or laura.norton@northwestern.edu.

New Coffee Services and Pantry/Beverage Supplies Preferred Vendor



Procurement and Payment Services recently issued a formal comprehensive Invitation to Bid for Coffee Services and Pantry Supplies. We received bids from seven individual suppliers. The Evaluation Committee consisted of individuals from various departments and schools. The committee determined that **Mark Vend Company** was the vendor that represented the best value to Northwestern. Mark Vend Company has extensive knowledge and experience with higher education end-users, and will offer up to 17 coffee brands for purchasing.

More information will be forthcoming. PPS will also work with Mark Vend to develop a plan to transition departments and schools from the current Preferred Vendor (Canteen) to Mark Vend. We are also working to add Mark Vend's catalog to iBuyNU. If you have questions, please contact Julie Maul, Procurement Administrator, at 847.491.5321 or julie.maul@northwestern.edu.

New Contracts

Digital Signage Software Contract Award

Procurement and Payment Services, in collaboration with a committee of representatives from numerous schools and departments from across Northwestern, including Information Technology, has awarded a contract to **REACH Media Network** for a campus-wide digital signage software solution. For further information, please visit the [Preferred Vendor page for REACH Media Network](#). For any questions please contact David Zohfeld at 847.491.8122 or d-zohfeld@northwestern.edu.

Chicago Campus Parking Garage Management

A new contract was recently awarded to **ABM** to manage the Northwestern parking garages on the Chicago campus. This contract was awarded based on the results of a formal, competitive bid on behalf of the Department of Safety and Security.

Catering Contracts Awarded

Procurement and Payment Services encourages Northwestern departments and schools to use Northwestern Catering, the official campus caterer, whenever possible. Information is available at northwestern.sodexomyway.com/catering.

As a complement to Northwestern Catering, PPS recently issued a formal Invitation to Bid and awarded Preferred Vendor contracts to six external caterers. More than 50 caterers were invited to submit proposals, and 20 proposals were received and evaluated by a committee comprised of several department and school representatives.

The following vendors were determined to represent the best value to Northwestern:

Northwestern Catering

Stephanie Klafert
847.467.6114
stephanie.klafert@sodexo.com

Catering by Michaels

Emily Proia
847.213.5031
eproia@cateringbymichaels.com

Jewell Events Catering

Katherine Piotrowski
312.374.8205
kpiotrowski@georgejewell.com

Amazing Edibles

Diana Streit
312.563.1600
diana@amazingediblescatering.com

Food for Thought

Jenna Byrne
Delivered Team Manager
847.745.5145
jbyrne@fftchicago.com

Limelight Catering

Nicole Orlando
773.883.3080
norlando@limelightcatering.com

Catered by Design

Tami Henry
847.965.4094 ext. 205
tamih@cateredbydesign.com

Brian Kiefer
FFT Senior Sales Consultant
847.745.5134
bkiefer@fftchicago.com

These vendors not only offer excellent food and service capabilities, but also demonstrated the attention to detail, breadth of services, and the commitment to customer service Northwestern requires. The vendors awarded represent a wide range of catering services.

An additional benefit of using Northwestern Catering or one of the six preferred caterers is that the Northwestern Event Rider has been embedded into the contract, so a separate Event Rider is no longer needed for each event.

If you have any questions, please contact Julie Maul, Procurement Administrator, at 847.491.5321 or julie.maul@northwestern.edu.



New Contracts

General Lab Equipment Break-Fix Program

As the result of a competitive bid, **Unity Lab Services** (by Thermo Fisher Scientific) was awarded a Preferred Vendor contract for general lab equipment break-fix and preventative maintenance program. The contract applies to any “Category 1” equipment (e.g. centrifuges, refrigerators, freezers), and is not limited to Thermo equipment. Service should be requested through the Fisher Stockrooms and processed via iBuyNU for automated invoicing and billing. If ULS is unable to provide service for the equipment, they will assist as best as possible with helping you find a service contact.

Brochures and contact information will be available in the stockrooms. For details on pricing and how to request service please see the [Lab Supply Stockroom](#) section of our website. For any additional questions please contact Kimberly Li, Procurement Administrator, at 847.467.0837 or kimberly.li@northwestern.edu.

Pipette Calibration Program

We are pleased to announce a University Preferred Vendor contract for pipette calibrations with **Gilson, Inc.** Gilson certified technicians will be on-site every quarter in the Fisher Stockrooms and will be able to service any brand of pipette. Free manufacturer seals, o-rings, and tip holders will be provided as needed. Calibrations include service label and a comprehensive report for each pipette. Service comes with a 1-year warranty including labor and parts. Service will be performed in the Fisher stockrooms and orders will be processed in iBuyNU via the Fisher punchout catalog. To see pricing and sign up for service on one of the scheduled dates please see the [Lab Supply Stockroom](#) section of our website.

For service: sign up for a service date online, bring pipettes to your campus stockroom on the scheduled date, and stockroom attendants will help you create an iBuyNU cart and assign the cart for processing. You will be contacted when the service is complete to pick up the pipettes. The iBuyNU cart will be processed into a PO and automatically invoiced.

For questions about service please contact your Fisher representative. For questions about the contract please contact Kimberly Li, Procurement Administrator, at 847.467.0837 or kimberly.li@northwestern.edu.

Beware of Toner Pirates!

Toner pirate scams have targeted Northwestern for many years now, but recently several departments have reported that these scam efforts have increased. Toner pirates are companies that will call departments and give the impression they represent the company from which you leased or purchased your printer or copier. Sometimes they will be promoting a special deal on toner. Another tactic is to appear as if they are confirming an order that has already been placed. If you order or confirm an order from them, you will receive the toner, but you will also get an invoice that likely reflects much higher pricing than you expected. Below are a few things to remember about toner purchases at Northwestern:

- If you have a copier from one of the Preferred Vendors in our [Copier Management Program](#) (Ricoh, Regal Business Machines, or Gordon Flesch), your toner is included in your monthly cost, therefore there will never be a need for you to order toner and pay extra for it.
- You should never receive a call from these companies or from the manufacturers they represent (Ricoh, Konica, Canon, and Kyocera) asking if you need toner.
- You should never pay for toner for your copier from these Preferred Vendors; normal delivery is included (you will only be charged for delivery if you specifically request next-day delivery).
- Toner for desktop printers can be ordered in iBuyNU from our office supplies vendor [Office Depot OfficeMax](#), or our computer supplies vendor [CDW-G](#). You will need to pay for this toner, but you initiate the order. The vendor should never contact you.

If you receive a call from a person who would like to ship you toner, just say no – more than likely, it’s a scam. For questions, please contact Tom Luczkowiak at 847.491.8411 or t-luczkowiak@northwestern.edu.



Updates on Existing Contracts

Office Depot OfficeMax live in iBuyNU

Office DEPOT OfficeMax With the recent merger of **Office Depot and OfficeMax**, PPS is excited to announce that the Office Depot web-based catalog platform has launched in iBuyNU, replacing the OfficeMax catalog previously used by Northwestern. This new catalog boasts an improved user interface, search capabilities, and visibility to the portfolio of sustainable products. Our same great contract pricing is reflected in the new catalog.

If you have any questions regarding this catalog in iBuyNU, please contact Keith Paddy at 847.467.6963 or k-paddy@northwestern.edu.

ABT Electronics has been added to iBuyNU!



PPS is excited to announce that **ABT Electronics** has been added to the iBuyNU Marketplace. As part of the Preferred Vendor contract with ABT, Northwestern receives a discount off the lowest advertised price, free delivery and haul away, and discounted installation on an extensive range of appliance and electronics products.

A dedicated representative is also assigned to Northwestern, for any specialized needs or order assistance. Please contact Megan Magnuaki at 847.544.2521 or mmagnuski@abt.com for support.

If you have questions, please contact Julie Maul, Procurement Administrator at 847.491.5321 or julie.maul@northwestern.edu.

Databank IMX Representative Change



Lisa Morgan is the new Northwestern contract representative for Northwestern's Preferred Document Imaging Services Vendor, **Databank IMX**. Lisa can be reached at 708.296.4865 or lmorgan@databankimx.com.

Complete Book and Media Supply Shipping Fee Update



Please note Complete Book and Media Supply has changed the minimum purchase threshold from \$15 to \$35. Shipping is free for orders of \$35 or more. For more information about this vendor, visit their [Preferred Vendor page](#), or contact Betsy Costello, Procurement Administrator, at 847.467.0590 or m-costello@northwestern.edu.

American Hotel has been added to iBuyNU



Procurement and Payment Services leveraged a competitively-bid contract with **American Hotel** that was established by E&I Cooperative Services, of which Northwestern is a member, and adopted it as a Preferred Vendor. Departments and schools will receive a discount off the advertised price, plus free shipping is available.

The American Hotel catalog is scheduled to go live in iBuyNU the week of Monday, July 11. If you have any questions regarding this contract, please contact Laura Norton at 847.467.3345 or laura.norton@northwestern.edu.

BIDS AND CONTRACTS IN THE WORKS

Procurement and Payment Services is always working to establish Preferred Vendor contracts that best serve the needs of all Northwestern departments and schools.

These are a combination of new contracts and timely rebids of current contracts. PPS is currently working on the following:

- Printing
- Event Rentals (tents, chairs, tables, etc.)
- Carpet and Flooring
- Window Treatments and Blinds
- Hotels
- Northwestern IT Next Generation Voice Solution
- FAMIS software replacement
- Info-ed software replacement
- Identity Management and Provisioning
- Timekeeping system
- Background check, /I9/e-verify system
- Global Marketing social media
- Printer repair
- Data recovery services

For questions about these or other bids, please contact PPS at 847.491.8120 or procurement@northwestern.edu.

Wildcard Advantage Spotlight

New Wildcard Advantage businesses for Summer 2016:

Armoire	Chicago	bit.ly/advarmoire	1 month free
Barry's Computer Consulting & Repair	Evanston	bit.ly/advbarrys	10% off
Chicago Grind	Chicago	bit.ly/advgrind	10% off
Evanston Float Center	Evanston	bit.ly/advfloat	15% off (<i>students only</i>)
Everyday Cycles and Motion	Evanston	bit.ly/advcycles	5-10% off
FlowersFlowers	Evanston	bit.ly/advflowers	10% off
Grazia Studio and Boutique	Evanston	bit.ly/advgrazia	10% off
IB Driven LLC	Evanston	bit.ly/advibdriven	10% off
La Cocinita Restaurant	Evanston	bit.ly/advcocinita	10% off (<i>students only</i>)
Lock Chicago – Escape Rooms	Evanston	bit.ly/advlock	15% off
New Horizons Center	Evanston	bit.ly/advhorizons	20% off
Output Lounge	Chicago	bit.ly/advoutput	10% off (<i>students only</i>)
Papa Chris' Place	Chicago	bit.ly/advpapachris	10% off (<i>students only</i>)
Pizzeria Aroma	Chicago	bit.ly/advpizzeria	10% off (<i>students only</i>)
Poochie's	Evanston	bit.ly/advpoochies	15% off
Salon Zoey	Chicago	bit.ly/advzoey	10% off
SUMPHOTO Photography	Chicago	bit.ly/advsumphoto	15% off
Urban Imaging Group	Chicago	bit.ly/advurbanimaging	5% off

Visit our website for the full list of participating businesses: northwestern.edu/wildcard

Follow us on Twitter for the latest updates: [@NU_Wildcard](https://twitter.com/NU_Wildcard)

Check us out on the [NUhelp app](#) or click on “Discounts” on the official [Northwestern Mobile app](#)



Fisher and Supplier Partners Donation to the Science in Society Program



Procurement and Payment Services would like to thank [Fisher Scientific](#), and their supplier partners, for a generous donation of basic lab supplies to the Science in Society Program's afterschool STEM program. Lab supply donations were received from internal Thermo Fisher companies and their supplier partners, with significant contributions from the following: Corning, Fisher Scientific, Kimberly Clark, Microflex, Millipore, Promega, Thermo Scientific, and Wheaton. The donations were used at the Chicago Boys & Girls Clubs Uptown location and the new location in Little Village.

Fisher representatives also participated in a science competition at the Uptown Boys & Girls Club for grades 5-8. A special thank you to the following people for their help with this event: Jarod Schweighart (Fisher), Sheila Anderson (Fisher safety), Mike Gorack (Fisher), and Mica Zaragoza (Promega).

Thank you to Fisher and their supplier partners for their generosity and participation in such a great cause! Also, thanks to Mike Kennedy, founder of the program and Northwestern Research Professor and Director, who invited Procurement and Payment Services to work with them on this initiative.

Procurement and Payment Services Directory

Procurement and Payment Services

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t-luczkowiak@northwestern.edu

Please visit the [Procurement and Payment Services Directory](#) for a full list of contact information.