Blazing the trail

By Barry Coulson, ASDT Sector Executive Lead

The initial three-year ‘implementation phase’ of the ASDT Initiative draws to a close on March 31, 2016. As a result, we are heavily engaged in a strategic planning exercise that will set the tone and direction for the initiative for the following three years, 2016-17 through 2018-19. This exercise gives us an opportunity to reflect upon the successes and challenges of the initiative to date, and to help inform the strategic direction as ASDT evolves into a multi-disciplinary program in the years ahead.

To help determine the strategic direction of the ASDT Program, I have been attending meetings of various stakeholder groups, including sector associations, communities of practice, and institutional management, seeking feedback and soliciting ideas. For some of these groups, this is the first time that the ASDT Program has been explained to them directly, and their positive reception, level of engagement, and constructive contributions have been encouraging.

This level of engagement will continue, first with respect to the strategic plan and then later as we move to operationalize the plan and engage with all stakeholders to move the ASDT Program forward. For now, I will continue to reach out to these groups, including at the Partnership Forum on November 26th.

This Partnership Forum is a critical step in the evolution of the ASDT Initiative: much of the discussion will focus on the scope of ASDT over the next few years and on the opportunities that we should be pursuing. Your input at any of these consultation sessions – or directly to the ASDT Office – is vitally important in shaping the future direction of ASDT.

My thanks for your continued engagement in the ASDT Initiative, and in particular, for your insight and ideas on its future scope and direction as a program. I look forward to our continuing success as we blaze the trail together.
Points on the horizon

By Dennis Silva, Director, Joint Procurement Operations Team (JPOT)

Every road eventually narrows into a point on the horizon, leading to its destination. As we move through the remaining procurement projects in Wave 2, the Joint Procurement Operations Team is starting to look at the next point on the horizon to start building the pipeline and model for long-term planning and sustainment efforts.

The first common category for which we have started looking to the horizon is Facilities. On September 30th, members of the Facilities Community of Practice met with the Procurement Community of Practice to discuss an approach for planning the Facilities category, the objectives, and the next areas of opportunities. Several proposed procurements arose from that session and will continue to be explored.

Next on the horizon? In the next few weeks, JPOT will be starting focused discussions relating to potential opportunities in the Logistics common category and other areas.

Another point on the horizon is the potential direction of joint procurement itself. Sector leaders have started a review of the next stage of JPOT and its evolution to sustain the collaborative efforts of joint procurement. Experiences gathered from this past year’s activities and studying what other jurisdictions are doing, along with active sector dialogue, will be critical and a key consideration as the next stage evolves.

British Columbia’s new shared institutional repository network

The BC Post-Secondary Administrative Service Delivery Transformation Report (aka “the Deloitte Report”) identified among several opportunities for the library sector to transition to a shared digital repository. The BC Electronic Library Network (BC ELN), with its over 20-year track record of successfully coordinating shared services among public post-secondary libraries, has since made huge strides in making the vision of a shared BC institutional repository (IR) network a reality.

In 2014 the Ministry of Advanced Education and the ASDT Steering Committee awarded BC ELN seed funding to coordinate a provincial IR network that will provide anytime, anywhere access to research generated at BC’s post-secondary institutions. Central coordination of a multi-institution network will result in considerable savings for the sector. The IR network is also foundational to the creation of the proposed Provincial Digital Library.

Much has transpired since the first year of seed funding was granted. A software selection committee completed a rigorous investigation and RFQ process. In the end, Islandora, supported and hosted in Canada by PEI-based discoverygarden, was selected for the IR network platform. College of the Rockies, Douglas College, Emily Carr University of Art + Design, Justice Institute of BC, Thompson Rivers University, University of the Fraser Valley and the University of Northern British Columbia stepped forward as the early adopter institutions who took part in the first phase of implementation. (Continued next page >)
A Request for Information (RFI) for the ASDT Procure-to-Pay (P2P) initiative was posted on BC Bid on October 6th, 2015. The RFI was developed by the P2P Working Group under the ASDT Collaborative Initiative and issued through BCNET on behalf of the sector.

The purpose of the RFI is to obtain information about commercially available P2P solutions to help guide potential future purchasing options that meet the requirements of BC’s public post-secondary institutions. The RFI closed on October 30th, 2015, and seven submissions have been received.

The results of the RFI will be used to update and inform the existing business case, which is scheduled to be presented to the ASDT Steering Committee in December.

British Columbia’s new shared institutional repository network (Cont’d)

A callout for additional participants will be sent in the next phase of development; several institutions have shown keen interest in participating.

Both the Advisory Committee, which provides direction for the initiative, and the Implementation Working Group have been busy preparing for the fall rollout. The Advisory Committee chose Arca as the name for this project and developed branding, including a logo and tagline: Discover BC’s digital treasures. The Implementation Working Group, made up of representatives from early adopter sites and sites with existing IRs, laid the groundwork of metadata standards, best practices, workflows and initial content.

Arca has launched this fall with the aforementioned seven early adopters. What’s next for this initiative? The Ministry of Advanced Education has confirmed funding for phase two of the initiative, which will involve the development of a discovery layer enabling cross-repository searches of not only Arca repositories, but other BC post-secondary digital repositories using different platforms.

Procure-to-Pay Project issues Request for Information (RFI)

A Request for Information (RFI) for the ASDT Procure-to-Pay (P2P) initiative was posted on BC Bid on October 6th, 2015. The RFI was developed by the P2P Working Group under the ASDT Collaborative Initiative and issued through BCNET on behalf of the sector.

The purpose of the RFI is to obtain information about commercially available P2P solutions to help guide potential future purchasing options that meet the requirements of BC’s public post-secondary institutions. The RFI closed on October 30th, 2015, and seven submissions have been received.

The results of the RFI will be used to update and inform the existing business case, which is scheduled to be presented to the ASDT Steering Committee in December.

Two institutions (Vancouver Island University and University of the Fraser Valley) recently joined the P2P Working Group as ‘RFI Participating Institutions’. They will assist existing Working Group members (BCIT, Camosun College, College of the Rockies, Langara College, North Island College, Simon Fraser University and University of Victoria) in the evaluation of submissions received as a result of the RFI.

P2P refers to the workflow and supporting tools to make the initial decision to purchase a good or service (shopping), source the procurement (buying), and receive and pay for the good or service (paying). For the user, this creates an intuitive online shopping experience and lowers costs through strategic sourcing, early payment discounts and streamlining of current paper-intensive processes.

Procure-to-pay scope (top) and current processes
Collaborative approach boosts Enterprise Resource Planning project

Enterprise Resource Planning (ERP) systems in the post-secondary environment not only fulfill the traditional role of integrating the management of finance, human resources, payroll, procurement, customer relations and facilities, but also manage student lifecycle processes (from recruitment to graduation), alumni engagement and fundraising.

Most of BC’s 25 public post-secondary institutions run their own independent ERP system with various functional modules. Some institutions run integrated commercial software packages, while others run in-house custom software or use a best-of-breed approach. The institutions belonging to the Administrative Services Consortium (ASC) run on a combined installation that is hosted by Camosun College. The three predominant systems in use are Oracle PeopleSoft, and the Colleague and Banner systems produced by Ellucian.

Over the next 7-10 years, all institutions will need to upgrade or replace their systems, requiring significant investments in financial and human resources, with associated inherent risks. This is greatly complicated by the lack of available funding for these activities.

Enter the ASDT ERP Project, which kicked off in June 2015. Under the sponsorship of the ASDT Steering Committee and with initial funding support from the Ministry of Advanced Education, the ERP Working Group is assessing ways to pool resources across the sector to shorten ERP transition timeframes, minimize costs and reduce risks.

Shelley Legin from VIU is the ASDT Steering Committee Sponsor for the Project. The ERP Working Group consists of Oliver Grüter-Andrew (former CIO of UBC), Carol Baert (VP Finance & Facilities, NIC), Barry Coulson (ASDT Sector Executive Lead), Jag Maden (CIO, LANG), Fred Jacklin (Registrar, VIU), Paul Stokes (CIO, UVIC), Stephen O’Connor (CIO, CAP), Davis Swan (Manager, Business Application Services, BCNET), Tracey Szirth (VP Finance & Administration, DOUG), and John Wightman (Project Manager, ASDT Collaboration Office).

ASDT Sector Executive Lead Barry Coulson highlights the potential of the ERP Project to have a positive impact on the sector. “We see this as a huge opportunity to cooperatively plan ahead and work together to mitigate substantial costs across the sector over the next few years,” said Barry.

The Project is currently in the exploratory stage and will consider the needs of all 25 institutions through internal and external information gathering and analysis. The assessment will consider a wide range of opportunities for system implementation and/or collaboration, ranging from a shared pool of ERP expertise, to business process alignment, to one or more standardized/shared system configurations or instances. There are no preconceived notions as to the desired outcome; for example, that one integrated system is the preferred solution.

The project deliverable to the ASDT Steering Committee, targeted for March 31st, 2016, is an ERP strategy paper that will identify options for collaboration in order to realize efficiencies and minimize the costs of system upgrades and changes over the next decade. As input to the strategy, the project is developing a data collection survey that will soon be sent to all institutions to help document the current state and business needs across the sector.
New vending machines on display at University of the Fraser Valley

The University of the Fraser Valley (UFV) campus is the first to have new vending machines installed under the ASDT joint procurement agreement for vending services, which was awarded last summer to Ryan Company Ltd. Eight other institutions are in the process of signing participation agreements with Ryan Vending for similar services.

Cameron Roy (left), Director of Ancillary Services for UFV and Sector Lead for the Vending Services joint procurement opportunity, and Rob Oughtred, Director, Operations with Ryan Vending, show that smartphone technology can be used with Ryan Vending’s newly installed vending machines.

Vending Services PSI Lead Cameron Roy (left) and Glen Jackson, President, Ryan Company Ltd., flank a new Ryan Vending machine that provides healthy drink choices. Sparkling water options are also available from the new vending machines.

Upcoming Meeting Reminders

ASDT Fall Partnership Forum
November 26, 2015 9:00 a.m. – 4:00 p.m.
SFU Centre for Dialogue, 580 West Hastings Street, 320 Strategy Room
By invitation

This update is distributed to:

• PSI Presidents
• VPs of Finance and Administration
• Directors of Finance (FinWizards)
• Procurement Professionals
• ASDT Steering Committee
• ASDT Joint Procurement Committee
• BCAIU, RUCBC, and BCC Presidents
• ASDT Leads and Teams
• BCcampus
• Post Secondary Employers’ Association
• BCNET
• Ministry of Advanced Education
• Ministry of Education
## ASDT Initiative Progress Summary – Sept/Oct 2015

<table>
<thead>
<tr>
<th>INITIATIVE</th>
<th>PROGRESS HIGHLIGHTS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Strategic</strong></td>
<td></td>
</tr>
<tr>
<td>Travel Management</td>
<td>Master Service Agreement being finalized with the Working Group (WG) and proponent. Contract award expected in Nov.</td>
</tr>
<tr>
<td>Sector Print Strategy</td>
<td>Revised report with updated PSI usage data was received from the consulting firm. The report and proposed next steps will be tabled at the Nov. ASDT Steering Committee meeting.</td>
</tr>
<tr>
<td>In-House Booklet Printing</td>
<td>Ten post-secondary institutions have implemented in-house booklet printing.</td>
</tr>
<tr>
<td>Enterprise Resource Planning (ERP)</td>
<td>See feature article in this issue. PSI data collection survey targeted for early Nov.</td>
</tr>
<tr>
<td><strong>Joint Procurement</strong></td>
<td></td>
</tr>
<tr>
<td>Vending Services</td>
<td>Lead PSI (UFV) has been implemented; signing of participation agreements underway by KPU, COTR, CNC, TRU, VCC, SELK, VCC and NWCC.</td>
</tr>
<tr>
<td>Office Supplies</td>
<td>Proceeding with development of RFP despite potential changes to marketplace (i.e., Staples proposed acquisition of Office Depot).</td>
</tr>
<tr>
<td>Natural Gas</td>
<td>Work has continued on tasks from the Natural Gas 2015/16 Operational Plan.</td>
</tr>
<tr>
<td>Cylinder Gas</td>
<td>Draft RFP nearing completion.</td>
</tr>
<tr>
<td>Managed Print Services</td>
<td>Draft TOR, timeline and RFP requirements drafted for Working Group approval.</td>
</tr>
<tr>
<td>Trades Equipment</td>
<td>Most purchase orders for Welding and Electrical equipment have been placed by the 11 participating PSIs, under the new joint procurement contracts.</td>
</tr>
<tr>
<td>Courier Services</td>
<td>To expedite the RFP process, JPOT worked with TRU to add a piggy-back clause to their existing RFP. TRU’s RFQ closed Oct. 7; three responses received. TRU obtaining additional information from vendors as part of evaluation process.</td>
</tr>
<tr>
<td><strong>Financial</strong></td>
<td></td>
</tr>
<tr>
<td>Commercial Card</td>
<td>Seven institutions participating, with eight additional PSIs in progress.</td>
</tr>
<tr>
<td>Central Deposit Program</td>
<td>19 PSIs have deposited; continuing to promote program to PSIs. SFU and UVic have recently joined the program.</td>
</tr>
<tr>
<td>Reduced Merchant Fees on Credit Cards</td>
<td>PSI sector-specific agreement complete and signed by TD and Provincial Treasury. Agreement being formatted as a form to simplify onboarding.</td>
</tr>
<tr>
<td>Procure-to-Pay (P2P)</td>
<td>RFI posted to BC Bid Oct. 6 and closed Oct. 30; seven responses received. Two additional WG members added (UFV and VIU).</td>
</tr>
<tr>
<td><strong>Ancillary</strong></td>
<td></td>
</tr>
<tr>
<td>BC Electronic Library Network</td>
<td>See feature article in this issue. Arca public interface deployed. Early adopters began uploading content to their institutional repositories.</td>
</tr>
<tr>
<td>ASC (Colleague) Consortium</td>
<td>Workshop to review and determine preferred service delivery model for consortium members held Sept. 29. Report to ASDT targeted for Nov. 9.</td>
</tr>
</tbody>
</table>