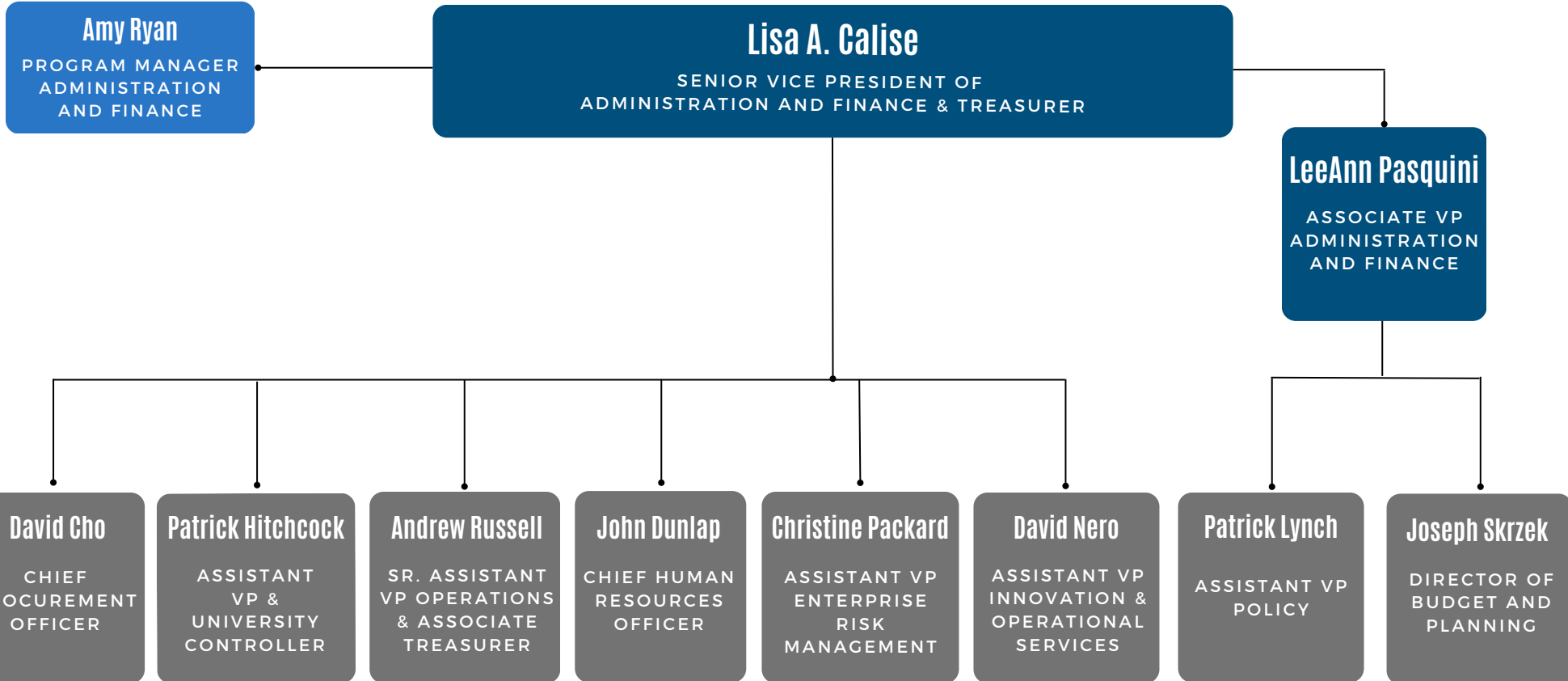


# UMASS PRESIDENT'S OFFICE ADMINISTRATION AND FINANCE



# Administration and Finance

## Contacts

**Lisa A. Calise | Senior Vice President of Administration and Finance & Treasurer**  
[lcalise@umassp.edu](mailto:lcalise@umassp.edu)  
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**LeeAnn Pasquini | Associate Vice President of Administration and Finance**  
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(774) 528-0245 (o)

**Patrick Lynch | Assistant Vice President of Policy**  
[plynch@umassp.edu](mailto:plynch@umassp.edu)  
(774) 528-0244 (o)

**Amy Ryan | A&F Program Manager**  
[aryan@umassp.edu](mailto:aryan@umassp.edu)  
(774) 528-0251 (o)

## Groups

**A&F Vice-Chancellors (AFC)**  
A&F policy setting, strategy, coordination & oversight  
Monthly meetings  
Lisa Calise  
[lcalise@umassp.edu](mailto:lcalise@umassp.edu)

## Working for You

The Administrative and Finance department acts as the liaison between the Board of Trustees and the campus A&F teams.

We additionally support the preparation and dissemination of key financial and performance metrics monitoring progress towards our desired objectives. Ultimately this data supports the creditworthiness of the University.

Our work consists of:

- Supporting the Universities mission of excellence, accessibility, and affordability by understanding and serving the financial and administrative needs of the UMass community.
- Ensuring that resources are being used in the most efficient and effective manner.
- Preserving the universities long term stability.
- Leading university-wide planning efforts.
- Coordinating with trustees in financial planning and forecasting, risk management, and policy making.
- Coordinating the development of Board of Trustees policies and accompanying administrative standards between key stakeholders at the campuses and within the President's Office.

Our department additionally:

- Adheres to the governance of our Financial Accountability Framework with four principals of oversight, internal controls, transparency, and risk management.
- Implements projects and initiatives that ensure financial sustainability.
- Delivers efficient operations to ensure access and affordability for students.
- Improves our capacity to deliver financial, administrative and other service objectives to our customers.

Our A&F team includes Treasury, Insurance and Operations, Budget and Planning, Controller's Office, Enterprise Risk Management, Human Resources, and the Unified Procurement Services Team (UPST), Innovation and Operational Services, Employee Services Team (EST), and Policy department.



# Administration and Finance

## Groups

### **Advisory Working Group on Financial Planning (AWG)**

University research & analysis related to short & long term financial sustainability

Quarterly meetings

LeeAnn Pasquini

[lpasquini@umassp.edu](mailto:lpasquini@umassp.edu)

### **Better Together Steering Committee (BTSC)**

Decision-making, strategy and coordination of process reviews

Bi-monthly meetings

David Nero

[dnero@umassp.edu](mailto:dnero@umassp.edu)

### **President's Council (PC)**

University A&F policy setting and oversight with Campus Chancellors

Lisa Calise

[lcalise@umassp.edu](mailto:lcalise@umassp.edu)

### **Board of Trustees (BOT)**

University policy setting, oversight and coordination on A&F related issues

Quarterly meetings

Lisa Calise

[lcalise@umassp.edu](mailto:lcalise@umassp.edu)

## Key Intersection Points

### **A&F Vice Chancellors (AFC)**

Coordinates policy and strategy on all matters related to A&F.

### **Advisory Working Group on Financial Planning (AWG)**

Researches, analyzes, and studies issues related to the University's ability to rethink its business model to become more efficient and effective, preserve access and affordability, ensure financial sustainability (short and long-term), and make strategic investments to maintain or improve quality.

### **Better Together Steering Committee (BTSC)**

Leads cross campus subject matter expert's in the strategic review of key A&F processes to increase our customers' availability of quality data and services.

### **Shared Services**

Provides shared services in the areas of treasury, and UPST and leads efforts to expand the use of shared services.

### **Board of Trustees (BOT) Policies and Administrative Standards**

Coordinates Board of Trustees policies of subject-matter specific working groups made-up of representatives from the campuses and within the President's Office and through the University's Board Policy Working Group (BPWG).

## More Information

More information is available at: President's Office Home Page - <https://www.umassp.edu/> and each department's landing page.





# Budget and Planning

## Contacts

### Joe Skrzek | Director of Budget & Planning

[jskrzek@umassp.edu](mailto:jskrzek@umassp.edu)  
(774) 528-0253 (o)

### Eric Gregoire | Assistant Director of Budget & Planning

[egregoire@umassp.edu](mailto:egregoire@umassp.edu)  
(774) 528-0247 (o)

## Groups

### Budget Directors

Budget Directors  
communication and  
coordination

Monthly, 4th Thursday, zoom  
Joe Skrzek  
[jskrzek@umassp.edu](mailto:jskrzek@umassp.edu)

### Financial Aid Directors & Sustainability Council

Communication and  
coordination for financial aid  
reporting and sustainability  
policy reporting

Eric Gregoire  
[egregoire@umassp.edu](mailto:egregoire@umassp.edu)

## Working for You

The Budget Office leads the development of the \$3.8 billion annual operating budget, the \$1.9 billion capital plan, and the 5-year financial forecast for the university.

We aggregate and analyze data in order to ensure that consistent information factors into management decisions and strengthens the University's financial position.

Our office also:

- Summarizes and tracks the annual state budget cycle, as well as legislation that impacts the university.
- Implements board-level policies, such as tuition & fees and sustainability, and develop new policies that are identified as critical to the university's financial position.
- Develops and maintains the A&F Executive Dashboard, which provides the financial information that drives our quarterly reporting process.

## Key Intersection Points

### Annual Budget Development

Annual process establishing major assumptions, analyzing revenue, expenses, enrollment and staffing. Develops and presents budget for approval to the Board of Trustees.

### Quarterly Projections and Budget Management

Quarterly budget reporting process including YTD actuals and year-end projection compared to budget along with enrollment and staffing information.

### Financial Forecast

Annual process to develop the 5-year financial forecast presented in December to Board of Trustees and used to submit fiscal year budget request to the state. Budget Office provides major assumptions and key ratio analysis.

Continue on other side



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# Budget and Planning

## Key Intersection Points

### **Capital Plan Development / Quarterly Capital Reporting**

Biennially develop capital plan and present to Board of Trustees. Capital plan includes all projects seeking Board and President approval for the next 24 month period plus future pipeline projects that are provided as informational.

### **Sustainability**

Coordinates with campus sustainability directors to implement Board's sustainability policy and produce annual report of activities and metrics used to evaluate progress.

### **Financial Aid Reporting**

Coordinates with campus financial aid directors to produce annual Financial Aid Report which delineates university's investment in need and merit-based financial aid and metrics used to identify impact of these investments.

## More Information

Additional information is available at:

<https://www.umassp.edu/budget-office>. The link includes budget reports, financial forecasts, state budget requests, capital planning, sustainability reports and more.

# Controller

## Contacts

**Patrick Hitchcock | Assistant Vice President & University Controller**  
[phitchcock@umassp.edu](mailto:phitchcock@umassp.edu)  
(774) 528-0337 (o)

**Kelly Gregory | Associate University Controller**  
[kgregory@umassp.edu](mailto:kgregory@umassp.edu)  
(774) 528-0341 (o)

## Groups

**Controllers Group**  
Controllers' communication and coordination  
Monthly, 4th Thursday, Shrewsbury  
Patrick Hitchcock  
[phitchcock@umassp.edu](mailto:phitchcock@umassp.edu)

**Reporting Group**  
Communication and coordination related to financial reporting  
Patrick Hitchcock  
[phitchcock@umassp.edu](mailto:phitchcock@umassp.edu)

## Working for You

The University Controller's office is responsible for the financial statements of the University, and for internal controls related to accounting and finance.

Our work consists of:

- Setting accounting policies and procedures to support the university community in making business decisions.
- Delivering the annual report, which contains the audited financial statements for the University System.

The Controller's office is responsible for:

- Being the primary contact for the University's external auditors and the Comptroller of the Commonwealth.
- Handling system-wide public records requests.
- Serving as a key liaison between various departments within the President's Office and across campuses.
- Collaborating with supporting organizations, such as the UMass Foundations and the UMass Building Authority.

## Key Intersection Points

### Chart of Accounts

Intersects with all campuses and users of PeopleSoft in maintenance of chart of accounts for University.

### Quarterly Reporting

Coordinates with campus controllers, University Budget Office, and controllers of affiliated organizations to ensure accurate financial reporting on quarterly basis.

### Policies and Procedures

Provides guidance and review of policies and procedures, focusing on proper internal controls.

Continue on other side



# Controller

## Key Intersection Points

### **Financial and Compliance Audits**

Responsible for annual external financial and compliance audits, liaison with campuses, Foundation and Building Authority. Coordinates with Internal Audit department on internal audits and development of related controls.

### **MMARS**

Provides processing of capital ISAs and other transactions for campuses in Commonwealth's accounting system, MMARS.

## More Information

More information is available at: [www.umassp.edu/controller](http://www.umassp.edu/controller). From the Controller's Office website, you can access links to policies and procedures, forms, as well as reports and audits.





# Employee Services

## Contacts

**David Nero | Assistant Vice President of Innovation and Operational Services**  
[dnero@umassp.edu](mailto:dnero@umassp.edu)  
(774) 528-0237 (o)

**Jeffrey Gull | Director of Employee Services**  
[jgull@umassp.edu](mailto:jgull@umassp.edu)

**Meghan Portmann | HR Application Manager**  
[mportmann@umassp.edu](mailto:mportmann@umassp.edu)  
(774) 570-5322 (o)

## Groups

### Payroll Leads

Campus payroll leads  
Monthly, call-in  
Jeffrey Gull  
[jgull@umassp.edu](mailto:jgull@umassp.edu)

### HR Leads

Campus payroll leads  
Monthly, call-in  
Carol Dugard  
[cdugard@umassp.edu](mailto:cdugard@umassp.edu)

## Working for You

The Employee Services Team includes three divisions: Payroll Services, HR Applications, and Travel & Expense.

- Payroll Services coordinates system-wide activity support timely and accurate payments to employees.
- HR Applications manages the HR Direct application which is used system-wide to support HR, Benefits, Payroll, Time and Labor, and Commitment Accounting.

## Key Intersection Points

### University-wide Payroll Services

Coordination of activities to deliver timely and accurate payroll to university full and part-time employees.

### Campus-specific Payroll Services

Supports campus-specific payroll activities for UMass Dartmouth campus and President's Office.

### Calendar Year End Coordination

Coordinates payroll-related calendar year end activities to ensure timely and accurate payroll tax reporting and filing.

### HR Direct Application Management

Supports and manages HR Direct application, including annual upgrade to take advantage of regulatory changes and feature improvements.

### University-wide Travel & Expense

Coordination of activities to deliver timely and accurate travel and expense processing to full and part-time employees.

## More Information

More information is available at: <https://www.umassp.edu/payroll>. Some access is limited to UMass staff only, you will be required to login using your UMass credentials.



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# Enterprise Risk Management

## Contacts

### Christine Packard | Assistant Vice President

[cpackard@umassp.edu](mailto:cpackard@umassp.edu)  
(774) 528-0249 (o)

### Olivia Watson | Analyst

[owatson@umassp.edu](mailto:owatson@umassp.edu)

## Groups

### ERM Executive Committee

Validates and prioritizes risks,  
and affirms risk mitigation  
strategies, goals and objectives

Meets quarterly

Christine Packard

[cpackard@umassp.edu](mailto:cpackard@umassp.edu)

### ERM Working Group

Identifies and assesses risks,  
and develops and implements  
risk mitigation strategies

Meets three times per year

Christine Packard

[cpackard@umassp.edu](mailto:cpackard@umassp.edu)

## Working for You

The University of Massachusetts System-wide Enterprise Risk Management (ERM) Program guides and implements an ongoing process to:

- Proactively identify risks across the University.
- Assess the potential impact of risks on core mission and strategic initiatives.
- Prioritize risks across the University.
- Identify, document and assess strategies to mitigate these risks.
- Monitor risks and risk mitigation actions.
- The UMass ERM Program provides critical risk information to leadership across the University to enable informed decision-making about strategy, policies and programs.

Our program additionally facilitates:

- Collaboration across the system on the development and implementation of certain health, safety, and security plans and programs.
- Communication by being the primary point of contact for the President's Office on domestic and international emergencies.

## Key Intersection Points

### Risk Management and Insurance

Supports Treasury in strategic development and administration of University's insurance programs.

### Emergency Management and Response

Supports coordination across system on significant emergencies impacting one or more campuses.

### Risk Assessment

Facilitates biannual assessment of risks with systemwide impacts.

### Policy Development

Supports development of risk-related policy.

## More Information

More information is available on the web.

<https://www.umassp.edu/enterprise-risk-management>



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# Human Resources, Labor Relations

## Contacts

**John Dunlap | Chief  
Human Resources Officer**  
[jdunlap@umassp.edu](mailto:jdunlap@umassp.edu)  
(774) 528-0371 (o)

**Jacquie Kittler | Director of  
Employee and Labor Relations**  
[jkittler@umassp.edu](mailto:jkittler@umassp.edu)  
(774) 528-0381 (o)

**Carol Dugard | Director HR  
Operations**  
[cdugard@umassp.edu](mailto:cdugard@umassp.edu)  
(774) 528-0393 (o)

**John Roy | Director of  
Compensation**  
[jroy@umassp.edu](mailto:jroy@umassp.edu)  
(774) 528-0268 (o)

## Groups

**Human Resources  
Administrators (HRA)**  
Communication and  
coordination related to Human  
Resources  
Monthly, last Monday,  
Shrewsbury  
John Dunlap  
[jdunlap@umassp.edu](mailto:jdunlap@umassp.edu)

**Benefits Committee**  
Communication and  
coordination related to  
Employee benefits  
Carol Dugard  
[cdugard@umassp.edu](mailto:cdugard@umassp.edu)

## Working for You

The University Human Resources Department covers a variety of operations. Our main functions are to:

- Uplift managers to best utilize the human resources they have available to them.
- Work with the campus HR teams, to ensure that the right talent is allocated efficiently in a way that makes sense.
- Develop and Implement policies and practices across our functions including recruiting, engagement, total rewards, payroll, training, organizational development, Human Resources Information Systems, Equal Employment Opportunity, and Labor and Employee Relations.

We are also responsible for:

- Ensuring compliance with federal and state employment laws and regulations.
- Managing system-wide applications for applicant tracking, pre-employment background screening, a learning management system (LMS), and affirmative action reporting.
- Serving as the liaison to the State Office of Employee Relations since most of the faculty and staff on our campuses partake in a collective bargaining unit.
- Working with the campuses' labor relations teams to coordinate system-wide labor strategies, and serve as the last, pre-arbitration step in grievance processing.

## Key Intersection Points

### Policy Development

Aids campuses in development, implementation, and interpretation of system-wide policies and in human resources and related matters.

### Labor Relations/Grievances Appeals

Development and implementation of University System collective bargaining strategy; serves as liaison with Commonwealth's Office of Employee Relations. Also serves as last, pre-arbitration step in most campus grievance procedures.

Continue on other side



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# Administration and Finance

## Groups

### Module Stewards and Campus Leads

Communication and coordination related to major project approval, funding and scheduling

Monthly, Wednesday, call-in

Carol Dugard  
[cdugard@umassp.edu](mailto:cdugard@umassp.edu)

### Labor Relations Group

Communication and coordination related to employee relations

Monthly, second Thursday, call-in

Jacquie Kittler  
[jkittler@umassp.edu](mailto:jkittler@umassp.edu)

### Chief Diversity Officers

Communication and coordination related to diversity and inclusion

Even numbered months, second Tuesday, call-in

John Dunlap  
[jdunlap@umassp.edu](mailto:jdunlap@umassp.edu)

### PageUp User Group

Coordination with PageUp and Campuses related to recruitment

Held monthly

Jacquie Kittler  
[jkittler@umassp.edu](mailto:jkittler@umassp.edu)

## Key Intersection Points

### Executive Compensation

Intersects with campuses to manage chancellor compensation and contractual benefits.

## More Information

UMass System Human Resources: <https://www.umassp.edu/hr>

UMass Amherst Human Resources: <http://www.umass.edu/humres>

UMass Boston Human Resources: <https://hr.umb.edu>

UMass Dartmouth Human Resources: <http://www.umassd.edu/hr>

UMass Lowell Human Resources: <https://www.uml.edu/hr>

UMass Medical School Human Resources:  
<https://www.umassmed.edu/hr>





# Innovation & Operational Services

## Contacts

**David Nero | Assistant Vice President of Innovation and Operational Services**

[dnero@umassp.edu](mailto:dnero@umassp.edu)  
(774) 528-0237 (o)

**Jason MacFayden | Manager, Business Applications**

[jmacfayden@umassp.edu](mailto:jmacfayden@umassp.edu)  
(774) 528-0238 (o)

**Holly Wang | Principal Business Analyst**

[hwang@umassp.edu](mailto:hwang@umassp.edu)

## Groups

**Better Together Steering Committee**

Campus A&F Leadership  
Monthly, 2nd Thursday, call-in  
David Nero  
[dnero@umassp.edu](mailto:dnero@umassp.edu)

**A&F Security Leads**

Campus A&F Security liaisons  
Monthly, times vary, call-in  
Holly Wang  
[hwang@umassp.edu](mailto:hwang@umassp.edu)

## Working for You

The A&F Innovation and Operational Services Department works across all administration and finance functions to support innovation and operational improvements. The team uses a combination of business analysis, project management, and technology to help A&F departments improve operations and implement new initiatives.

## Key Intersection Points

### Strategic Project Guidance

Provides strategic guidance and advice on business improvement and technology projects.

### Project Management

Provides project management and business analysis services from initial project proposal stage through implementation to closure.

### A&F Business Application Management

Manages several A&F business applications, including Salesforce case management, BuyWays, DocuSign, Smartsheet, and UM-Plan Budgeting.

### Finance System Access Management

Coordinates system-wide A&F application security activities and provides application security access approval and access reviews for the President's Office.

## More Information

### Public Website:

More information is available at: <https://www.umassp.edu/innovation-and-operational-services>. Some access is limited to UMass staff only, you will be required to login using your UMass credentials.



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# Treasury, Insurance, Operations

## Contacts

**Andrew Russell | Sr Assistant  
VP of Operations & Associate  
Treasurer**

[arussell@umassp.edu](mailto:arussell@umassp.edu)  
(774) 528-0353 (o)

**Treasury/Operations Main  
Number**

(774) 455-7100 (o)

**Sean Curry | Assistant  
Treasurer Operations**

[scurry@umassp.edu](mailto:scurry@umassp.edu)  
(774) 528-0344 (o)

**Kathleen O'Neil | Assistant  
Treasurer Tax**

[koneil@umassp.edu](mailto:koneil@umassp.edu)  
(774) 528-0351 (o)

**Monica Jackson | Director of  
Cash Management**

[mjackson@umassp.edu](mailto:mjackson@umassp.edu)  
(774) 528-0347 (o)

**Kathryn White | Director of  
Merchant Services &  
Unclaimed Property**

[kjwhite@umassp.edu](mailto:kjwhite@umassp.edu)  
(774) 528-0356 (o)

**Amy Thompson |  
Administrative Services &  
Operations Manager**

[athompson@umassp.edu](mailto:athompson@umassp.edu)  
(774) 570-5338 (o)

## Working for You

The University Office of Treasury, Insurance and Operations strives to create efficient and effective financial solutions by partnering with the university community. Our office assumes:

- Comprehensive treasury services, including banking services, cash management and tax guidance, to all five campuses.
- Maintenance of all banking and credit card relationships, and active management of the university's short-term investments.

Additionally, our office deals with and provides services in:

- Insurance, operations and oversight of supplemental retirement plan investments.
- Risk mitigation through the management of the university's loss control and loss prevention insurance programs.
- Management services and operational leadership to the UMass System Office (UMSO).

## Key Intersection Points

### Tax Planning & Reporting

Provides guidance and services to maintain compliance with federal and state tax laws. Ensures personnel are aware of how tax law affects current and prospective business procedures.

### Cash Management

Manages university bank accounts, reconciliation and cash flows. Maintains relationships with money market managers and other financial institutions.

### Merchant Services

Maintains credit card merchant accounts, including managing Point of Sale Terminals (POS) and overseeing Payment Card Industry (PCI) compliance.

Continue on other side



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# Treasury, Insurance, Operations

## Groups

### Bursars

Bursars communication and coordination

Monthly

Andrew Russell

[arussell@umassp.edu](mailto:arussell@umassp.edu)

### State Tax Issues Meeting

Communication and coordination concerning payroll and tax topics

Monthly

Kathleen O'Neil

[koneil@umassp.edu](mailto:koneil@umassp.edu)

### e-Commerce Committee

Communication and coordination regarding PCI compliance

Quarterly

Kathryn White

[kjwhite@umassp.edu](mailto:kjwhite@umassp.edu)

### Supplemental Retirement Plans Investment Committee

University sponsored retirement plans

Quarterly

Andrew Russell

[arussell@umassp.edu](mailto:arussell@umassp.edu)

### Calendar Year End (CYE) - 1098-T

Communication and coordination regarding tax forms

Weekly November – January

Kathleen O'Neil

[koneil@umassp.edu](mailto:koneil@umassp.edu)

## Key Intersection Points

### Investment Reporting

Analyzes and reconciles university investments, including Trust Fund Interest (TFI). Reports on performance of university's operating cash investment portfolio.

### Payment Operations

Weekly payment processing of university payments to students and suppliers. Continuous development and implementation of electronic pay solutions.

### Risk Management & Insurance

Strategic development and administration of University's insurance programs including General, Automobile and Management Liability, International Travel, and Comprehensive Crime.

### Operations

UMSO operations and administrative services.

## More Information

More information is available at: [www.umassp.edu/treasurer](http://www.umassp.edu/treasurer). Some access is limited to UMass staff only, you will be required to login using your UMass credentials.

Information about Merchant Services can be found at:

[www.umassp.edu/treasurer/cash-management/merchant-services](http://www.umassp.edu/treasurer/cash-management/merchant-services)

Information about UMSO Facilities and Operations can be found at:

[www.umassp.edu/facilities-operations](http://www.umassp.edu/facilities-operations)



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# Unified Procurement Services Team (UPST)

## Contacts

### David Cho | CPO

[dcho@umassp.edu](mailto:dcho@umassp.edu)

(774) 528-0281 (o)

### Brian Girard | Director of Procurement Operations

[bgirard@umassp.edu](mailto:bgirard@umassp.edu)

(774) 275-3336 (o)

### Michael Durkin | Director of Strategic Procurement

[mdurkin@umassp.edu](mailto:mdurkin@umassp.edu)

(774) 570-5424 (o)

### Amanda Onwuka | Director of Service and Quality

[aonwuka@umassp.edu](mailto:aonwuka@umassp.edu)

(774) 570-5467 (o)

### Anna Zuev | Special Projects Manager

[azuev@umassp.edu](mailto:azuev@umassp.edu)

(774) 275-3325 (o)

### UPST Customer Service Line

[upst@umassp.edu](mailto:upst@umassp.edu)

774-545-UPST (8778)

## Groups

### UPST Council

Communication and coordination for University purchasing

Monthly

Zoom/Campus

David Cho

[dcho@umassp.edu](mailto:dcho@umassp.edu)

## Working for You

The Unified Procurement Services Team (UPST) provides procure-to-pay shared services support to all campuses. UPST manages approx. \$1 billion in third party spend while driving a better, faster and cheaper shared services operations. Through campus collaboration, we leverage the university's economies of scale to achieve cost savings ranging from 10-30% and enhanced service levels with suppliers.

Our department strives:

- To provide responsive, consistent, and high-quality customer service.
- To reduce costs through process efficiency, automation/technology adoption, and strategic sourcing/category management.
- To drive adoption and compliance to the UMass Procurement Policy.
- To drive the UMass Supplier Diversity Program.
- To develop and maintain strong campus and supplier relationships.
- To provide staff with continuous development opportunities.

## Key Intersection Points

### Procurement Operations

Provides accounts payable/invoice processing, bank card administration, supplier management, and purchase order processing to all campuses. Works collaboratively within administration and finance to achieve efficiency at a lowest cost. Optimizes use of BuyWays for transaction processing. Processes about 250K invoices, 170K purchase orders, and 7K supplier update/additions per year.

### Strategic Procurement

Develops and executes sourcing events to maximize buying power of university. Manages categories of spend to ensure that university is realizing the most benefits from its vendor agreements. Drives systemwide Proactive Sourcing opportunities by leveraging UMass economies of scale in generating savings. Develops and executes vendor contracts with campus stakeholders. Saved system \$82 million since inception while processing average of 120 bid events and 2.5K executed contracts each year!

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Groups

**Customer Advisory Council**  
“Voice of the Customer” group  
with representatives from all  
campuses  
Amanda Onwuka  
[aonwuka@umassp.edu](mailto:aonwuka@umassp.edu)

**E&E Council**  
Communication and  
coordination for University  
purchasing  
Monthly, 3rd Wednesday,  
Shrewsbury  
Every Wednesday, call-in  
Michael Durkin  
[mdurkin@umassp.edu](mailto:mdurkin@umassp.edu)

Key Intersection Points

**Customer Service and Quality Assurance**  
Develops and maintains Service Level Agreements (SLAs) with campuses to ensure procurement operations are satisfactory. Manages relationships with campus stakeholders and provides high-quality customer service through variety of channels. Actively develops and communicates performance expectations with campus stakeholders to understand procurement needs and requirements. Processes about 27K support requests annually through phone, email, and Salesforce case management.

**Training and Communication**  
Designs, implements, and monitors training programs to support end user source-to-pay process knowledge needs. Drives communication of UPST activities, procurement policy, and process changes to both UMass stakeholders and suppliers. Over 4K processes through targeted process training and information sessions annually. Continues to strengthen engagement with stakeholders via weekly office hours, monthly Coffee with UPST sessions, town halls, and campus engagement sessions.

**Business & Travel Expense Support**  
Collaborates with the Employee Services Team (EST) to drive optimized travel and expense experience for system. Support includes training, troubleshooting, and providing customer service support as needed.

**Enhancement of UMass Supplier Diversity Program**  
Continues to create business opportunities for disadvantaged business enterprises including; minority, veteran, women, LGBT, and disabled business owners. Has increased diverse supplier spend by 6.8% YoY.

More Information

More information is available at: <https://www.umassp.edu/upst>. Some access is limited to UMass staff only, you will be required to login using your UMass credentials.

Learn more about active bids, policy, and more.

