



Los Rios CCD

2013-2014 PROGRAM REVIEW

SUPPORT SERVICES

Unit: Purchasing Department

Submitted by: *J. Ayers* 7/22/14
Submitter signature Date

Approved for Submission: *M. Walden* 7/22/2014
Unit Administrator Date

Review Approved: *Susan T. Louie* 7/23/14
Chancellor/District ALO Date

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I. Program Review Purpose

Definition of a Support Services Unit

For the purposes of this program review document, a support services unit is defined as a District department which is responsible for providing services throughout the District in a manner which creates and maintains an optimal learning environment for students and/or provides the necessary services to support the overall operation of the District and colleges.

Program Review Purpose

The purpose of review is to evaluate the quality of the support services provided and to use the information from the evaluation to plan program improvements. Regular program reviews are required to meet regional accreditation requirements, state requirements, and best practices. ACCJC Accreditation Standard I.B states,

The institution demonstrates a conscious effort to produce and support student learning, measures that learning, assesses how well learning is occurring, and makes changes to improve student learning. The institution also organizes its key process and allocates its resources to effectively support student learning. The institution demonstrates its effectiveness by providing 1) evidence of the achievement of student learning outcomes and 2) evidence of institution and program performance. The institution uses ongoing and systematic evaluation and planning to refine its key processes and improve student learning.

Support services units are expected to undergo a full review every three years.

Relationship of Program Review to Unit Plans

When completed, this Program Review document should provide the following to support your annual Unit Plan document:

- Unit mission statement
- Purpose statement that identifies how your unit supports creation and maintenance of an optimal student learning environment and/or provides the necessary services to support the overall operation of the District and colleges
- Findings to justify continuing or changing current operating procedures
- Justifications for requesting new resources

Program Review Due Dates

All departments must be reviewed at least once every three years during the year cited on the LRCCD Support Services Program Review Cycle. Reviews are due by June 30th of the year in which they are reviewed. A copy of the review will be maintained in the unit and the Office of Education and Technology.

Mission Statement

Provide your **unit's mission statement** below. Your statement must align with the District mission statement and should match your mission statement in your unit plan.

For reference, the following are LRCCD's Vision and Mission statements:

Vision Statement

We, the Los Rios community colleges, provide outstanding programs and services so that all students meet and exceed their educational, career, personal and social goals. We meet the social and economic needs of the community.

Mission Statement

Relying on their professional and organizational excellence, the Los Rios community colleges:

- Provide outstanding undergraduate education, offering programs that lead to certificates, associate degrees, and transfer;
- Provide excellent career and technical educational programs that prepare students for job entry and job advancement through improved skills and knowledge, including the demands of new technologies;
- Provide a comprehensive range of student development programs and services that support student success and enrich student life;
- Provide educational services that address needs in basic skills, English as a second language, and lifelong learning; and
- Promote the social and economic development of the region by educating the workforce and offering responsive programs such as service learning, business partnerships, workforce literacy, training, and economic development centers.

Provide your unit's mission statement below:

The LRCCD Purchasing Department strives to provide the highest level of professional, ethical customer service to internal and external customers while procuring quality goods and services for the best value within a reasonable time period and in compliance with federal, state, local and district regulations.

III. Unit Responsibilities

List your unit's **primary assigned responsibilities**, including those related to creating and supporting an optimal student learning environment and/or the overall operation of the District and colleges. Also identify any major projects your unit is expected to support on a periodic basis (e.g. opening of new facilities, IT infrastructure upgrades, etc.).

- Process requisitions, change orders, purchase orders for internal customers
- Supplier management
- Customer service for internal and external clients
- Solicitation and evaluation of bids and proposals
- Contract award and administration
- Fixed assets identification and control
- Liaison for labor compliance and prevailing wage reporting
- Surplus and equipment disposal management
- Research current trends

List those **district and college** operating units your unit must interact with on a regular basis in order to complete the primary responsibilities of your unit. Briefly describe the types of interaction you have with the listed units.

- District Office
- Campus Business Services Office
- Facilities Management
- Workforce and Economic Development
- Los Rios Police Department
- Various Campus Departments and Staff
- Risk Management
- Accounting Operations
- Receiving Departments

Purchasing unit interaction spans across all hierarchy levels throughout the District and colleges to provide customer service and order fulfillment for administration and faculty who directly interface with students to ensure the expectations during their academic experience are satisfied. Primary interaction occurs with staff authorized to encumber budgeted funds including Vice Presidents of Administration, Business Service Supervisors and management. Support staff and end users often provide additional technical details.

IV. Relevancy

Briefly describe why your unit's work is **relevant to the institution** with respect to how it supports an optimal student learning environment and/or overall operation of the District and colleges. State the reasons you expect the need for this program to continue.

The Purchasing Unit provides a level of professional expertise that surpasses the common ideology of "shopping". Knowledge of existing laws including Public Contract Code and Education Code are required when procuring goods and services for public agencies. These regulations guide the behavior of Purchasing staff to source and support district wide operations while honoring ethics, integrity and compliance. The practice of competitive sourcing versus preferred sourcing is aligned with the objective to purchase the best or lowest value for quality goods/services. The Purchasing Unit serves as a valuable resource with experience utilizing strategic sourcing avenues through cooperative agreements, piggybacking, and state contracts which require understanding and familiarization to identify the most cost effective and appropriate purchasing vehicle for each situation within a timely matter. Further spend analysis of the District's purchasing habits lends to identifying goods/services satisfying criteria to aggregate purchases strategically district wide to leverage buying power, negotiate bulk pricing and reduce overall spend through annual/term contracts. Visibility into district wide purchasing grants the ability to analyze and forecast maintenance, repair and operational spend based on market factors and economic trends which can assist in budget control.

V. Currency

Describe the ways in which your unit is **current** (e.g. technology use, equipment, approaches and methodologies), or what you need to do to become and remain current over the next three years.

Purchasing has sophisticated technology to create online requisitions, purchase orders and track fixed assets. The following are suggestions to continue advancing the unit's current status:

- The District needs to complete the online requisition implementation process to streamline the procurement process, be more cost effective and strategic.
- The District needs more visibility in commodity spend to advance towards strategic procurement. Recommend exploring existing software or compatible platform to integrate applications.
- The District should consider purchasing a supplier management resource that allows vendor self-registration, tracking of certificate of insurance and automated notification of informal/formal bids.
- The District should determine the priority level of small business outreach and if priority is high, develop program objectives and goals to measure success.
- The District needs to invest in archive database system and upgrade to include workflow that integrates with existing applications for current document storage. Consider incorporating managed print services districtwide through multi-function devices for potential result of savings.

VI. Effectiveness

1. List the types of data/information you will use to **assess how effective** your unit is in completing **each** of its primary responsibilities (e.g. student/client satisfaction surveys, audits, safety inspections, facility use information, product quality and timeliness, etc.).
 - Process requisitions, change orders, purchase orders – evaluate data accuracy, distribution, spend and timeline
 - Supplier management – spend analysis, source frequency, payment method
 - Customer service for internal and external clients – satisfaction surveys
 - Solicitation and evaluation of bids and proposals - # of advertised awards, evaluate rebids and cause
 - Contract award and administration – monitor completion dates, change orders, PCC compliance
 - Liaison for labor compliance and prevailing wage – evaluate response timelines
 - Researching current industry trends – evaluate existing procedures for effectiveness
 - Fixed assets – audit assigned profiles and consistency
 - Surplus management – audit files and process

2. Comment on how the results of your assessments (listed in #1) **provide evidence** of your unit's effectiveness.
 - Requested items ordered meet customers' expectations
 - Savings offered to end user to reduce budget commitment
 - Feedback on day to day interaction exposes areas needing improvement and identifying success
 - Confirms appropriate method of procurement utilized and regulations followed in accordance to PCC
 - Project timelines satisfied or documented justification modifying contract terms in accordance to PCC
 - Illustrate coordination efforts to obtain and distribute requested information
 - Benchmark and performance measure data grants visibility on strengths and weakness for operations
 - Asset management system reports and Internal Audit results returned minimal findings in purchasing data
 - Comprehensive surplus file documents retired assets

3. Identify any areas you believe **need improvement now**.

- Implementation of online requisition process
- Understand full ability of existing PeopleSoft features available for purchasing related function
- Strategic sourcing districtwide and standardization on shared commodities

4. Identify any areas you believe will need improvement to **respond to expected changes** in your unit's future primary responsibilities or overall unit workload (e.g. changes created by increased enrollment, state budget allocations, additional facilities, new technologies, etc.)

- Procurement card program
- Ability to process/distribute electronic contracts (POs/Change Orders) from PeopleSoft
- Accommodations to process digital signer authorization
- Notification to vendors regarding public projects (notice, addenda, award)

VII. Institutional Support for Unit Effectiveness

Based on your findings regarding your unit's effectiveness in meeting its primary responsibilities identify **how the District can better support** you in your improvement efforts.

- Support strategic sourcing committees based on standardization and category spend with districtwide stakeholders.
- Provide resources for the implementation of online requisitions
- Fund the purchase of commodity codes or vendor management application with built in codes to grant visibility on spend

VIII. Resources Required to Improve Unit Effectiveness

Briefly summarize current resources available to your unit (e.g. staff, facilities, equipment, professional development, research data, etc.) to carry out your primary responsibilities. Identify new **resources needed** to meet or maintain program effectiveness, maintain currency, and meet anticipated growth needs. Include evidence to support your conclusions.

- Consider reorganization of purchasing department through retirement and vacant positions.
- Support from information technology resources to implement and develop workflow for online requisitions.
- Explore PeopleSoft functionality regarding the automation of the change order process.
- Identify method to grant visibility to the professional services agreement process for end user.

- Evaluate and purchase of application for vendor management, insurance management and bid notification.
- Develop budget for small business outreach program for marketing material, sponsoring events and attending community programs.
- Hire support/services to review/modify all purchasing/contract documentation and create appropriate forms for intended application.
- Purchasing card program expansion to campus Business Services Office Supervisor
- Evaluate existing policies, thresholds, procedures

IX. Recommendations

1. Based on your program review findings, **list your recommendations** to improve your unit. (Cite appropriate section of this report for each recommendation.)

Utilize/invest in technology to streamline manual purchasing processes to enhance and expedite level of services provided to customers through:

- Online requisitions
- Supplier Registration/Management
- Insurance Management
- Contract/Agreement Routing & Approval
- Commodity/Category Spend
- P-Card program
- Vendor Education/Outreach

2. Suggestions for Improving the Program Review Process

Please provide any constructive **feedback** aimed at improving LRCCD's Program Review process, including ways in which it may be more effectively aligned with other processes at the District and colleges (strategic plan, other planning, resource allocation, etc.).

X. Appendix

1. List the **sources** you used to support this Program Review document.
2. Identify here the **supporting documents** (e-copies) you intend to include with your program review submittal.