Santa Rosa Junior College
Program Resource Planning Process

Purchasing 2014

1.1a Mission

The Sonoma County Junior College District Purchasing and Warehouse operation is to be recognized by Customers for delivering exceptional value-added results by being an organization committed to a cost-effective, value-added service that leverages the College's spending power and common work practices to deliver the lowest total cost of acquisition and best supplier performance.

The Department will pursue superior Customer service and ensure *Customers* are aware that we have provided value and met or exceeded all their expectations and business requirements. Each individual in our department is responsible for adopting a "Helpful Attitude" approach to customer service, product delivery, and representing the District.

Building *Customer* relationships is vital to achieving the departmental goals. This includes ensuring the *Customer* is thoroughly supported, kept informed at all times, and that we understand the *Customer's* expectations, meet those expectations, and manage the purchasing process to those expectations

1.1b Mission Alignment

The District's Strategic Plan directly supports the Mission of the District.

The Purchasing and Warehouse operations mission is aligned with the District's Strategic Plan to Improve Insitutional Effectiveness by seeking to implement customer service initiatives and processes that lead to added effectiveness and efficiency on a continous basis.

1.1c Description

The Purchasing Department handles all procurement for the District.

Purchasing services college departments by processing all requisitions, assisting departments with quotes, conducting complex informal quotes, releasing purchase orders to vendors, conducting formal competitive solicitations on behalf of college departments, conducting research and assisting departments with specification development and sources of supply for goods and services. Maintain DMV records for all District vehicles.

Annually we the department conducts the vendor qualification process as directed by the California Uniform Public Construction Cost Accounting Commission to develop a list of qualified vendors for public works projects.

In addition, the dpearment also oversees the administration of District travel and procurement card programs and contract administration. The staff acts as liaison to other departments where Purchasing issues and functions cross interdepartmental lines. In addition, the Director advises on legal and purchasing issues and oversees the preparation of procurement and contract matters for the Board.

Warehouse

The warehouse conducts receiving and incoming inspection of all goods as well as inter and intra-campus deliveries.
Provides resources for fixed asset tracking and annual fixed asset inventory.
Coordinates surplus property and archived records.
Manages stores supplies distribution.

1.1d Hours of Office Operation and Service by Location

Purchasing is located in Bailey Hall in the Santa Rosa Campus.

Office hours are Monday through Friday 8am - 5pm. In June and July the office is closed on Fridays.

The District has three warehouse locations:

. SRJC Warehouse located at 1880 Armory Drive, receiving hours are 7am – 4pm, closed from 12-1pm.
. Petaluma Campus warehouse is located at 680 Sonoma Mountain Parkway with the same operating hours.
. Windsor warehouse is located at 5750 Skylane Blvd. it is used for long term high volume storage and District-wide archival record storage.

Warehouse hours are 7 am to 4 pm, Monday Through Friday, closed Fridays in June and July.

1.2 Program/Unit Context and Environmental Scan

Purchasing and Warehouse staff maintains a fast paced work schedule to be able to meet the demands of the District in an effective and efficient manner.

The staff is required to have knowledge of applicable District policies and procedures. Purchasing staff is required to have knowledge of state and federal laws that impact procuring for a public college in California.

In the next year we plan on conducting more formal training of the staff as well as cross-train Buyers for additional effectiveness.

2.1a Budget Needs

The Purchasing Department operates within its authorized overall budget, however, there is a need for additional training of staff and acquisitons of software tools that can enhance the procurement function for districtwide staff.

Additional Funding Needs:

- Professional staff development and training
- Purchase of e-sourcing software tool
- Add one part time storekeeper to provide relief to warehouse staff who currently relies on student workers and custodial staff
- Purchase Forklift for warehouse

2.1b Budget Requests

Rank	Location	SP	M	Amount	Brief Rationale
0001	ALL	08	06	$40,000.00	Purchase e-sourcing software tool to conduct formal bids and informal quotes as well as vendor management tools and contract management. This tool will be utilized by Purchasing Staff and other Departments within the College who process quotes.
0002	Santa Rosa	08	00	$5,000.00	Professional development training for staff. This kind of training is not available through internal SRJC resources.
0003	ALL	08	06	$23,000.00	Purchase a forklift to replace a current unit that has reached it's useful life, the unit has frequent breakdowns with the last repair estimate exceeding $6,000 making the purchase of a new unit more cost effective
0004	Santa Rosa	08	06	$9,800.00	Additional part time storekeeper to assist warehouse and relieve employees when sick or on vacation. The use of custodial staff has been available for this purpose, however due to growth in the demand for custodial staff it is harder to receive assistance for the warehouse. If the warehouse coordinator and the storekeeper need to be out currently there is no continuity of services for receiving or delivery.

2.2a Current Classifed Positions

Position	Hr/Wk	Mo/Yr	Job Duties
Buyer - Senior	40.00	12.00	The Senior Buyers performs difficult and complex technical duties related to the development of request for proposals, purchasing of services, supplies, and equipment in accordance with established policies and regulations; program,train users and administer the District purchasing software system; serves as lead worker to Buyers; trains end users in the use of purchasing software system and policy.
Purchasing Specialist	40.00	12.00	Provides administrative support for the Director and the Buyers. Is the first point of contact for internal customers as well as external contractors and vendors. Maintains contract and purchasing files. Provides support for Graphics operations.
Warehouse Coordinator	40.00	12.00	Coordinates the daily operations of the warehouse, performs a variety of shipping/receiving, stocking activities; stores and distributes supplies and equipment; conducts and maintains inventory and stock records; maintains records for the Fixed Asset Program; is responsible for day to day warehouse operations.
Storekeeper I (1.0 FTE)	40.00	12.00	Performs a variety of shipping/receiving, stocking activities; stores and distributes supplies and equipment; maintains inventory and stock records; maintains records for the Fixed Asset Program.
Buyer	40.00	12.00	The Buyer researches, evaluates and purchases services, supplies and equipment based on price, service, quality and warranty to meet the needs of the District; writes specifications, prepares bid forms and handles bidding process, analyzes bid results and makes recommendations and awards; authorizes

Position	Hr/Wk	Mo/Yr	Job Duties
			and signs purchase orders; processes purchase orders and travel requests; verifies available funds and appropriateness of acquisitions in accordance with District policy and state and federal regulations.
Buyer	40.00	12.00	The Buyer researches, evaluates and purchases services, supplies and equipment based on price, service, quality and warranty to meet the needs of the District; writes specifications, prepares bid forms and handles bidding process, analyzes bid results and makes recommendations and awards; authorizes and signs purchase orders; processes purchase orders and travel requests; verifies available funds and appropriateness of acquisitions in accordance with District policy and state and federal regulations.

2.2b Current Management/Confidential Positions

Position	Hr/Wk	Mo/Yr	Job Duties
Director Purchasing and Graphics Services	40.00	12.00	The Director, Purchasing and Graphics Services, in accordance with District policy and procedure, directs the work of others engaged in the procurement of a wide range and volume of materials, equipment, and contracted services, including commodities, bidding of construction, repair, and public works projects, high cost complex purchases, leases, contracts, vendor insurance verification, surplus property, stores inventory control, and long term records retention. Responsibilities include exercising contract signature authority as delegated by the Superintendent/ President and the Vice President of Business Services and providing direction and guidance to other members of the District regarding purchasing. The Director, Purchasing and Graphic Services is also responsible for directing the work of technical employees in design, typesetting, printing and copy work for District offices. This includes establishing charge-back procedures, setting prices, and preparing maintenance & service contracts for all department equipment.

2.2c Current STNC/Student Worker Positions

Position	Hr/Wk	Mo/Yr	Job Duties
Student - Warehouse Delivery	25.00	12.00	Delivers supplies and packages on campus and assists Storekeepers.
Student - Warehouse Delivery	25.00	12.00	Delivers supplies and packages on campus and assists Storekeepers.
Student - Fixed Asset data entry	25.00	12.00	Assist Storekeepers in maintaining the Fixed Asset database.
Student - Office administrative assistance	25.00	12.00	Assists classified staff with clerical tasks.
Student - Warehouse Delivery	25.00	12.00	Delivers supplies and packages on campus and assists Storekeepers.

2.2d Adequacy and Effectiveness of Staffing

The current Purchasing and Warehouse Staff is able to maintain workloads by multi tasking and utilizing student workers, however, as the college grows the department will face the demand for additional staff in order to provide adequate services to College departments.

Purchasing:

If a new Bond is approved for the District, the department will need to hire a professional Buyer to assist with day to day work as there will be an increase in Bond related solicitations. The current staff will need to continue handling the day to day reponsibilities as well as activities linked to the department's annual plan.

Warehouse:

Demand for warehouse services has increased as the College has grown. Warehouse responsibilities include coordinating daily warehouse operations, shipping and receiving, deliveries, organizing, storing and distributing store materials, receiving furniture, surplus equipment and accounting for all equipment.

Almost all departments have expanded and added staff to accommodate the changes and growth, but the headcount at our warehouse stayed the same we are left with very limited resources and depend on student help in most of our operations.

The collaboration or teamwork we have developed over the years with the Custodial department has helped to carry out our operations more smoothly, but over the past year or so it has been getting tough to get help as their department is experiencing shortage of custodians and the fulltime custodians are been replaced by part-time employees. This is impacting warehouse negatively and stretching our resources very thin.

With the significant increase in warehouse activities and no change in headcount, safety could be compromised. We are relying on student helpers to cover many duties and critical assignments that are supposed to be performed by well-trained warehouse staff person. Also, it is hard to rely on student help because their primary goal, as it should be, is their education. Their job at the warehouse is a transition to go through college and we have to spend significant amount of time to train students that will stay for a while, and then do it all over again as they graduate or move to other jobs. This takes a lot of resources and time of our staff. In addition, since we don't allow student drivers to operate Forklifts, it hampers our ability to use them as needed. These are the reasons we believe it is imperative and timely to hire a second Storekeeper I to meet the growing demand for warehouse services.

2.2e Classified, STNC, Management Staffing Requests

Rank	Location	SP	M	Current Title	Proposed Title	Type

2.3a Current Contract Faculty Positions

Position	Description

2.3b Full-Time and Part-Time Ratios

Discipline	FTEF Reg	% Reg Load	FTEF Adj	% Adj Load	Description

2.3c Faculty Within Retirement Range

2.3d Analysis of Faculty Staffing Needs and Rationale to Support Requests

2.3e Faculty Staffing Requests

Rank	Location	SP	M	Discipline	SLO Assessment Rationale

2.4b Rational for Instructional and Non-Instructional Equipment, Technology, and Software

e-sourcing software tool

In a recent survey conducted by the District's Institutional Research Department respondents ranked the use of technology tools in purchasing as the #1 area of improvement for purchasing.

The acquisiton of the software tool for e-sourcing will allow purchasing to process formal and informal bids. Requestors will also be able to process their quotes electronically, other benefits include the ability to generate reports to determine vendor diversity spend, utilize the tool to qualify vendors under the California Uniform Public Construction Cost Acounting Commission for public works projects and track contract and vendor management for a more efficient and effective process. These tools are currently not availabe in the Escape Software program that is used districtwide.

Forklift for warehouse

The request is to replace the forklift that has exceeded its useful life and is in need of continuous repairs. The new forklift will replace the old unit which is over 23 years old.

2.4c Instructional Equipment and Software Requests

Rank	Location	SP	M	Item Description	Qty	Cost Each	Total Cost	Requestor	Room/Space	Contact

2.4d Non-Instructional Equipment, Software, and Technology Requests

Rank	Location	SP	M	Item Description	Qty	Cost Each	Total Cost	Requestor	Room/Space	Contact
0001	ALL	08	06	e-sourcing software tool	1	$40,000.00	$40,000.00	Laura Rivera, C.P.M.	Purchasing Department	Laura Rivera, C.P.M.
0002	Santa Rosa	08	07	Forklift for warehouse	1	$23,000.00	$23,000.00	Laura Rivera, C.P.M.	Warehouse	Laura Rivera, C.P.M.

2.5a Minor Facilities Requests

Rank	Location	SP	M	Time Frame	Building	Room Number	Est. Cost	Description

2.5b Analysis of Existing Facilities

Purchasing

The Department is located in Bailey Hall, the office space arrangement is limited. The Department does not have use of a centralized conference room for bid openings and meetings as it is standard in most public purchasing environments. Two of three Buyers work out of a cubicle which makes their daily work cumbersome since they conduct a significant part of their work over the phone.

A more fitting office environment is desired to accomodate more business meetings and more fitting office space as well as ease of use for vendors.

Warehouse

Currently warehouses are operating at close to full storage capacity due to the large number of records currently stored. The initiative for integrated digital records archival system has not been implemented, this was supposed to free up valuable warehouse space.

We continue to use aisles to store surplus equipment, safety supplies, records and other items at floor level, this creates an unsafe situation as the staff is unable to move or place any storage onto the higher level racks or access other supplies and materials as needed. There is a dire need to digitalize records and relieve storage space to more fitting purposes.

The Santa Rosa warehouse receiving area is rusting and needs repair and paint.

The warehouse has no insulation and there are holes on the floor which allow for rodents and moisture to come into the building making it an unsafe working environment.

3.1 Develop Financial Resources

At this time the department does not track diversity spend. The acquisiton of a software tool will allow for vendor and contract management including diversity spend reporting.

3.2 Serve our Diverse Communities

The diversity make-up of all reporting areas:

62% Caucasian
23% Hispanic
15% African American

38% Female
62% Male

3.3 Cultivate a Healthy Organization

Professional development is an on-going initiative that provides the tools for professional Buyers to provide better and more thorough service levels to end users and vendors.

In the coming year the department will engage in additonal training for the purchasing staff, as well as cross training to ensure continuity of services.

3.4 Safety and Emergency Preparedness

Warehouse staff are current in Forklift, MSDS, and other warehouse related safety training.

The department has two building area safety coordinators who participate in the College's Health and Safety initiatives.

3.5 Establish a Culture of Sustainability

The purchasing department procures recycled paper and remanufactured toner cartridges for districtwide consumption.

The purchasing and warehouse areas collaborate in the coordination of recycling of computers, vehicles, office equipment, toner cartridges, modular office partitions.

4.1a Course Student Learning Outcomes Assessment

N/A

4.1b Program Student Learning Outcomes Assessment

N/A

4.1c Student Learning Outcomes Reporting

Type	Name	Student Assessment Implemented	Assessment Results Analyzed	Change Implemented

4.2a Key Courses or Services that address Institutional Outcomes

Course/Service	1a	1b	1c	2a	2b	2c	2d	3a	3b	4a	4b	5	6a	6b	6c	7

4.2b Narrative (Optional)

5.0 Performance Measures

Purchasing

Acquisitions for goods or services requiring bids, multiple quotes, or Request For Proposals.	**Bids and RFP's can require significant time to prepare, advertise, analysis, board approvals and contractual execution.** **FY10-11 total 773** **FY 11-12 total 1288** **FY 12-13 total 765**
Purchasing Activities	**Purchase Orders:** **10-11 4523 $14,771,511** **11-12 4326 $18,929,810** **12-13 4089 $16,796,408** **P-Card** **FY10-11 $691,703 total spend in 3,819 transactions** **FY 11-2 $741,072 total spend in 1,080 transactions** **FY 12-13 $242,431 total spend in 221 transactions** **Measure A Purchase Orders** **05-06 405 $127,847,693** **06-07 501 $ 96,926,937** **07-08 570 $100,105,276** **08-09 498 $ 57,133,274**

	09-10 357 $ 13,104,744 10-11 269 $ 4,224,094 11-12 216 $ 6,283,193 12-13 121 $ 3,846 909
Uniform Construction Cost Accounting Act	Qualified Contractors: 2010-11 - 103 2011-12 - 42 2012-13 - 29 Each vendor qualifications application requires the review of data in an 11 page qualification document and attached surety, license, and insurance certifications.

Warehouse

Surplus items picked up - 4732

Items recycled or reused by other departments - 2376

Pckages shipped - 198

Archived records received - 207 boxes

Archived records destroyed - 100 boxes

Stores requisitons filled - 367

Fixed asset transactions - 476

Number of packages received in Fiscal year 12-13 - 7600

6.1 Progress and Accomplishments Since Last Program/Unit Review

Rank	Location	SP	M	Goal	Objective	Time Frame	Progress to Date

6.2a Program/Unit Conclusions

Location	Program/Unit Conclusions
ALL	Lack of support for ePurchasing solutions reflects negatively on the District's relationships with the business community.

6.2b PRPP Editor Feedback - Optional

Purchasing

The Purchasing Department oversees the acquisition of goods and services for all college programs. All procurement must be conducted in compliance with Board Policy and State and Federal Laws.

There are 3 Buyers on staff and a Purchasing Specialist and a Director.

Several initiatives need to occur in the department to improve efficiency and effectiveness:

- Use of electronic procurement tools to expedite the sourcing process, including processing of formal bids and quotes.
- Strategic sorcing initiatives for certain commodities to provide sources of supply with contracted pricing for end users to utlize without having to process a quote every time they procure.
- Increase the quote threshold to $5,000, this is aligned with best practices amongst peer community colleges.
- Additional cross training of Buyers and Purchasing Specialist to support end users in a more expeditious manner.
- The Department is engaged in a customer service initiative and additional training and buy-in needs to take place accross the board for all reporting areas not only purchasing.

- The department currently processes a large number of service contracts that require the use of resources at small dollar values and minimal liability risk. This function needs to be evaluated for a more expeditious and effective process.
- End users need on-going training and direction on purchasing requirements as well as training on how to conduct quote processes and ensure best value in acquisitions.
- On going training in the Escape system to maximize its use for end users and purchasing staff.
- An added goal for the Department is to attain the recognition of "Excellence in Procurement" granted by the National Institute of Governmental Procurement, the program requires meeting certain benchmarks that the department will be engaging throughout the coming fiscal year.

Warehouse

Warehouse Services conducts receuiving and shipping functions for the Santa Rosa Campus, in addition they coordinate surplus and coordinate fixed assets tagging and fixed asset inventories.

A Warehouse Coordinator and a Storekeeper manage all warehouse activity.

- The addition of a part time store keeper will greatly improve the staff's ability to complete additional cleaning and reorganizing projects as they are unable to do this with current resources.
- There is no back up coverage at this time, if either or both current employees are out. A well trained forklift certified storekeeper will eliminate the need to utilize custodial staff to help out when needed.

6.3a Annual Unit Plan

Rank	Location	SP	M	Goal	Objective	Time Frame	Resources Required
0001	ALL	08	06	Improve District's staff knowledge of the procurement process	Hold 2 additional training sessions besides the training offered during the Annual Professional Development Day	On - Going	Existing staff resources
0002	ALL	08	06	Improve the efficiency of the bid and quote process and vendor reporting tools	Acquire and implement an e-sourcing software tool to provide automation to the bid and quote process as well as provide for diversity spend reporting and contract management	Complete by FY 2016	. Purchase annual license $40,000
0003	ALL	08	06	Improve the effectiveness of the current business process for contracting	Document and review the current business process for contract forms and vendor requirements and streamline the rpocess for increased efficiency	On Going	Existing staff resources
0004	ALL	08	06	Improve knowledge base of the Purchasing Staff	Provide on going training to purchasing staff on procurement methods allowed under state law, review and streamline current business processes	On going	existing resources
0005	ALL	08	07	Improve the warehouse service levels for customers	To provide needed help to warehouse staff to handle clean up and reorganize warehouse contents and provide continuity of services when current staff are out of the office	July 2014i	Budget for an STNC Storekeeper
0006	ALL	08	06	Attain "Excellence In Procurement Designation" from NIGP (National Institute of Governmental Procurement)	Implement measures required to attain this designation, including implementing additional automation in the procurement process, codnucting surveys and updating current policies to mirror best business practices and state law, improving customer service levels.	June 2015	Purchase e sourcing tool ($40,000) Professional Development ($5,000)). Utilize existing in-house resources