

Santa Rosa Junior College

Program Resource Planning Process

Purchasing 2016

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 Institutional Effectiveness by seeking to implement customer service initiatives and processes that lead to added effectiveness and efficiency on a continuous 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. Processing of contract forms including review for adherence to District policies.

Annually 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 department 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

Additional Funding Needs:

- Professional staff development and training
- Electronic bid software license

2.1b Budget Requests

Rank	Location	SP	M	Amount	Brief Rationale
0001	ALL	08	06	\$25,000.00	Annual allocation for e-sourcing software tool license renewal
0002	Santa Rosa	08	00	\$5,000.00	Professional development training for staff. This kind of training is not available through internal SRJC resources.

2.2a Current Classified Positions

Position	Hr/Wk	Mo/Yr	Job Duties
Buyer - Senior	40.00	12.00	The Senior Buyers is responsible for the processing of public works bids including the development of request for proposals, processing requests for services, supplies, and equipment in accordance with established policies and regulations; administers the District purchasing software system; serves as lead worker to Buyers; trains end users in the use of purchasing software system and policy and participates in department training events.
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. Updates the department web page content. Processes travel requests and manages the contract report for the Board agenda.
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 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.

Storekeeper II Petaluma Campus (1.0 FTE)	40.00	12.00	Performs a variety of shipping/receiving, stocking activities, distributes supplies and equipment, maintains inventory and stock records.
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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 and supervises the work of staff engaged in the procurement of a wide range 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 also directs and supervises the warehouse function. 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	Receives and delivers supplies and packages on campus and assists warehouse coordinator with fixed assets inventory and surplus equipment
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.
STNC - Warehouse Delivery- assists with inventory	25.00	12.00	Delivers supplies and packages on campus and assists Storekeepers.
Student-Warehouse and Copy Center	25.00	12.00	Delivers supplies and packages on campus and assist storekeepers. Runs the daily copy center route.

2.2d Adequacy and Effectiveness of Staffing

The current Purchasing and Warehouse Staff maintains current workloads by multi tasking and utilizing student workers.

Purchasing:

The current staffing level is adequate for the workload, however resources are operating at capacity and this becomes critical at times of increased demand for services and staff work overtime to meet the demand.

Warehouse:

Demand for warehouse services has increased as the College has grown. Warehouse responsibilities include coordinating daily warehouse operations, shipping and receiving, deliveries to departments,

organizing, storing and distributing store materials, receiving furniture, surplus equipment and accounting for all equipment.

There are 2 full time employees one STNC and student workers, resources are already stretched and students turnover is high making it difficult for the staff to meet the demands of the areas serviced.

The warehouse operates collaboartively with the Custodial department who at times has assisted during vacations or staff absences, however, reosurces are stretched there as well and extra help is not always available.

2.2e Classified, STNC, Management Staffing Requests

Rank	Location	SP	M	Current Title	Proposed Title	Type
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2.3a Current Contract Faculty Positions

Position	Description
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2.3b Full-Time and Part-Time Ratios

Discipline	FTEF Reg	% Reg Load	FTEF Adj	% Adj Load	Description
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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
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2.4b Rationale for Instructional and Non-Instructional Equipment, Technology, and Software

e-sourcing software tool

The software tool for e-sourcing allows Purchasing to process bids 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 Accounting Commission for public works projects and track contract and vendor management for a more efficient and effective process. Continued funding for this application is requested.

2.4c Instructional Equipment and Software Requests

Rank	Location	SP	M	Item Description	Qty	Cost Each	Total Cost	Requestor	Room/Space	Contact
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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	Purchasing Department	Laura Rivera

2.5a Minor Facilities Requests

Rank	Location	SP	M	Time Frame	Building	Room Number	Est. Cost	Description
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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 dedicated 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 accommodate more business meetings 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.

The warehouse doesn't have a dock and this makes shipping and receiving very cumbersome, it is also costly as some vendors charge extra to deliver without a load dock.

3.1 Develop Financial Resources

At this time the department does not track diversity spending. The acquisition 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:

66% Caucasian
17% Hispanic
17% African American

42% Female
58% 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.

The department participates in professional development opportunities provided by professional associations such as the California Public Procurement Officers (CAPPO) and Institute for Supply Management (ISM).

Purchasing and warehouse staff also participate in training offered during PDA, as well as training offered internally such as safety, emergency management and disaster recovery and forklift training.

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
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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
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4.2b Narrative (Optional)

5.0 Performance Measures

Purchasing

Purchasing Department Activity							
	Bids, RFP, Quotes Issued	Purchase Orders Issued	Total PO Spend	P Card Transactions	P Card Spend	Measure A Purchase Orders	Measure A PO Spend
Fiscal Year 11-12	1288	4326	\$ 18,929,810	1080	\$ 741,072	216	\$ 6,283,193
Fiscal Year 12-13	765	4089	\$ 16,796,408	1316	\$ 821,410	121	\$ 3,846,909
Fiscal Year 13-14	1308	4218	\$ 19,021,730	1591	\$ 949,741	150	\$ 2,254,280
FISCAL YEAR 15-16	29 FORMAL BIDS						

CUPCCA Qualified Contractors

Fiscal Year 11-12	42
Fiscal Year 12-13	29
Fiscal Year 13-14	32
Fiscal Year 14-15	100

Warehouse

Surplus items picked up - 3207

Items recycled or reused by other departments - 2751

Packages shipped - 193

Archived records received - 223 boxes

Archived records destroyed - 23,820 lbs

Stores requisitions filled - 948

Fixed asset transactions - 547 green tags and 969 gold tags

Number of packages received in Fiscal year 13-14 - 9041

6.1 Progress and Accomplishments Since Last Program/Unit Review

Rank	Location	SP	M	Goal	Objective	Time Frame	Progress to Date
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	Since January of 2015 we have held 7 staff trainings at the Santa Rosa and Petaluma Campus
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	The electronic bid system software tool IonWave Technologies was implmented and went "live" in December of 2015.
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 process for increased efficiency	On Going	We are currently in process of developing a purchasing procedural manual to be completed by Fall of 2016. The contracts recording, signature and renewal processes will be implmented in the electronic bid system IonWave with a completion timeline fo Spring 2017.
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	Since April of 2015 the purchasing staff has participated in 12 professional development events
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 2014	An STNC for warehouse was hired in July of 2015
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	The application for this designation was submitted on May 31, 2016. Results to be issued in August of 2016.

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.
ALL	Additional electronic tool applications such as email of PO's, access to a vendor portal for vendor registrations in Escape are needed to ease the vendor data base management process and eliminate paper in the procurement process to the extent it is feasible.

6.2b PRPP Editor Feedback - Optional

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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	Provide on going training to internal staff on procurement requirements, use of finance system for issue of requisitions	On - Going	Existing staff resources
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 process 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 and increase in professional development budget