# 1. Assessment Plan - Four Column

## PIE - Administrative Services: Purchasing, Printing Services, & Mail Services Unit

### Where We Are Now: Analysis and Summary

*2018-19*

**Contact Person:** Teresa Patterson
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**Critical Decisions Made by Unit:** The Purchasing Department implemented an automated vendor and bid management system, PlanetBids. This system streamlines the process of issuing and receiving bids. The system is entirely automated including the receipt of electronic bids. Bid documents are uploaded and managed through the system, including bidder questions and answers. Bid tabulations are immediately published upon closing of the bid, which allows contractors to get the information through the system rather than contacting Purchasing staff. The system also manages insurance certificates, including issuing automated notices to vendors when their insurance is about to expire. Last, we implemented an Emergency Operations module through PlanetBids. When vendors register in the system, they indicate whether or not they can provide emergency supplies, services, or equipment in the event of an emergency. This allows Mt. SAC staff to easily locate vendors and make purchases during an emergency event.
**Notable Achievements for Theme C: Secure Human, Technological, & Financial Resources:** Successfully recruited and filled two Vacant positions in the Print Services Department due to the retirement of the Print Services Coordinator and the Print Services Technician. Both positions were filled by internal candidates. This has created two new vacancies for the Lead, Printing Technician and the 47.5% Printing Technician. The Department has been utilizing temporary hourly help to back-fill while the newly vacant positions are in the recruitment process.

The Purchasing Department implemented OnBase for uploading and storing Requisition, Purchase Order, and Change Order backup documentation (Board approvals, quotes, contracts, etc.). Facilities and IT staff have been trained to upload their backup documents directly into OnBase rather than emailing the documents to Purchasing. This has eliminated the need for Purchasing to print hard copies for the Accounts Payable staff, since they now have access to view the documents through OnBase.
**Notable Achievements for Theme D: To Foster an Atmosphere of Cooperation and Collaboration:** 1. Additional P-Cards were issued during the 2018-19 Fiscal Year. There are now 107 individuals utilizing this procurement method, which allows for the purchase of small dollar supply items as well as certain travel-related expenses. During 2018-19 there were 1,314 p-card transactions totaling $485,899. This program has been beneficial for the campus by providing a faster, more efficient means of acquiring needed supplies and expediting time-sensitive or emergency purchases.

2. Over 250 contractor pre-qualification applications were processed in 2018-19. The pre-qualification process allows contractors to be pre-approved to bid on the College's construction projects. This process involves checking contractor references, bonding capacity, and financial stability.

3. Purchasing staff processed the following:
   Purchase Orders: 4,882
   Change Orders: 663
   No. of purchases requiring use of Purchasing Credit Card: 268
   Bids/RFPs: 56 Bids and RFPs were issued in 2018-19.

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| *Unit Goals* | *Resources Needed* | *Where We Make an Impact: Closing the Loop on Goals and Plans* |
|---|---|---|
| **Improve Efficiencies -** Implement the OnBase Document Management system to manage and store Requisition documentation (e.g. quotes, contracts, W-9s, Insurance, Invoices, etc.)<br>**Status:** Archive<br>**Goal Year(s):** 2016-17, 2017-18, 2018-19<br>**Goal Entered:** 06/29/2016<br>**Date Goal Archived/Inactivated:** 06/26/2019 | **Report directly on Goal** | **Reporting Year:** 2018-19<br>**% Completed:** 100<br>This project has been completed. (06/26/2019) |
| **Staff Development -** Continue seeking staff development opportunities such as conferences and workshops to improve job skills and efficiencies for Purchasing staff.<br>**Status:** Active<br>**Goal Year(s):** 2015-16, 2016-17, 2017-18, 2018-19, 2019-20<br>**Goal Entered:** 06/26/2019 | **Report directly on Goal** | **Reporting Year:** 2018-19<br>**% Completed:** 100<br>Staff continued to attend conferences, workshops, and meetings, both on and off-campus during 2018-19. Attending these events has helped to increase staff's knowledge related to Public Procurement, as well as other areas such as managing stress, reducing conflict, and health management. (06/26/2019) |
| **Replace Faculty Walk-Up Copiers -** In order to maintain the existing 8 faculty walk-up copiers, it is recommended that we follow a replacement cycle of one per fiscal year.  Estimated cost = $12,000.<br>**Status:** Active<br>**Goal Year(s):** 2018-19, 2019-20 | **Report directly on Goal**<br><br>**Request - Full Funding Requested -** 1 faculty walk-up copier was replaced in 2018-19.  In order to replace aging equipment, it is | **Reporting Year:** 2018-19<br>**% Completed:** 100<br>One new faculty walk-up copier was purchased and delivered and installed on June 27, 2019. (06/26/2019) |

| Unit Goals | Resources Needed | Where We Make an Impact: Closing the Loop on Goals and Plans |
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| **Goal Entered:** 06/26/2019 | necessary to fund at least 1 faculty walk-up copier for 2019-20.<br>**Describe Plans & Activities Supported (Justification of Need):** To maintain necessary equipment to support faculty, staff, and students for all educational needs<br>**Lead:** Teresa Patterson<br>**Type of Request:** INSTRUCTIONAL SUPPORT PROGRAM FUNDING (INSTRUCTIONAL EQUIPMENT): Equipment, library material, or technology for classroom instruction, student instruction or demonstration, or in preparation of learning materials in an instructional program, equal or over $500.<br>**Planning Unit Priority:** Medium<br>**Documentation Attached?:** No<br>**One-Time Funding Requested (if applicable):** 12000 | |
| **Replace Equipment in Printing Srvices -** Printing Services provides high-volume print services to the campus.  The current 3-hole drill is outdated and in need of replacement. The approximate costs to replace this equipment is $10,500.<br>**Status:** Archive<br>**Goal Year(s):** 2018-19<br>**Goal Entered:** 07/02/2018<br>**Date Goal Archived/Inactivated:** 06/26/2019 | **Report directly on Goal** | **Reporting Year:** 2018-19<br>**% Completed:** 100<br>New 3-hole drill was delivered and installed in April 2019 (06/26/2019) |
| **Automate Bid/Vendor Management for Purchasing -** Purchasing is in need of automating its Bid/Vendor Management processes.  An automated system will streamline the | **Report directly on Goal** | **Reporting Year:** 2018-19<br>**% Completed:** 100<br>System was implemented in April 2019. (06/26/2019) |

| Unit Goals | Resources Needed | Where We Make an Impact: Closing the Loop on Goals and Plans |
|---|---|---|

process of issuing, monitoring, conducting bid evaluations, and awarding bids.
**Status:** Archive
**Goal Year(s):** 2018-19
**Goal Entered:** 07/02/2018
**Date Goal Archived/Inactivated:** 06/26/2019

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**Additional Staff for Mail Services -** Mail Services is requesting one additional 47.5% employee in order to improve efficiencies and deliveries to the growing campus.  As the number of students, faculty, and staff have increased and new programs and buildings added, Mail Services staffing levels have remained the same.  Services are currently provided by two full-time employees.  Mail Services has been able to maintain service to the campus, however, they are unable to increase delivery schedules.  Several departments have requested that deliveries be made to additional locations, but Mail Services is unable to fulfill those requests with the current staffing levels.  Hiring one 47.5% employee will help improve efficiencies and will aid in providing additional customer service to the campus.
**Status:** Active
**Goal Year(s):** 2018-19, 2019-20
**Goal Entered:** 07/02/2018

**Report directly on Goal**

**Request - Full Funding Requested -** Hire one (1) 47.5% Mail Room Operator to augment the existing Mail Services staffing.
**Describe Plans & Activities Supported (Justification of Need):** Workloads and delivery locations have increased in the Mail Services Department over the past several years, but staff has remained at two (2) full-time employees.  Hiring additional staff will help reduce workloads and provide faster sorting and deliveries of mail to the campus.  In addition, mail services could add additional drop off locations to their current schedule as new programs come on line and additional staff hires.  In addition, adding an additional employee would help ensure department coverage when

**Reporting Year:** 2018-19
**% Completed:** 0
This Goal was not funded through the previous new resource request.  Currently, the Department is utilizing one part-time hourly to help out with sorting and delivering mail.  However, Mail Services is still unable to meet the requests for deliveries to additional locations.  Furthermore, when one of the two full-time employees takes vacation, or other leave, the Department is left with only one full-time person plus the hourly.   (06/26/2019)

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staff are absent or on vacation.
**Lead:** Teresa Patterson
**Type of Request:** STAFFING: Requests for permanent employee positions or temporary/hourly employees.
**Planning Unit Priority:** High
**One-Time Funding Requested (if applicable):** 25000
**On-Going Funding Requested (if applicable):** 25000

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**Business Cards -** Increase in ongoing funding is needed for the purchase of Business Cards due to an increased number of new hires and increased printing costs. The amount requested is based on a three-year average in total spending.
**Status:** Active
**Goal Year(s):** 2018-19, 2019-20
**Goal Entered:** 07/17/2018

**Report directly on Goal**

**Reporting Year:** 2018-19
**% Completed:** 0
Additional funding requested through the New Resource Allocation process was not approved. This account continues to exceed the amount budgeted by approximately $5,000. (06/26/2019)

**Request - Full Funding Requested -** Ongoing Increase of $5,000 to be added to current Budget for printing of Business Cards
**Describe Plans & Activities Supported (Justification of Need):** The costs for printing business cards has increased as have the number of orders placed due to an increase of new employees.
**Lead:** Teresa Patterson
**Type of Request:** OTHER OPERATING EXPENSES AND SERVICES: Requests for contracted, legal/ audit, personal/ consultant, rent/ leases, repairs/ maintenance, and other misc. services. May also include request for travel and conference that does not require the assistance of POD.
**Planning Unit Priority:** Medium
**On-Going Funding Requested (if applicable):** 5000