

# 1. Assessment Plan - Four Column



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

### Where We Are: Analysis and Summary

2017-18

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**External Conditions, Trends, or Impacts (Student Services):** Purchasing continues to be impacted by the Department of Industrial Relations (DIR) SB 854 Public Works Contractor Registration Law. This law requires that all public works contracts awarded in excess of \$25,000, and all maintenance contracts in excess of \$15,000, be reported to the DIR through an on-line portal. In addition, an extra step has been added requiring verification that all contractors awarded work under the above thresholds are registered with the DIR. These extra steps are time-consuming as we process hundreds of these orders annually.

**Internal Conditions, Trends, or Impacts (Student Services):** The College's P-Card program has now been expanded to include 95 individuals who are utilizing this particular procurement method. While the program is beneficial for the campus staff by providing a more efficient method of purchasing and expediting time-sensitive purchases, it has created additional duties and responsibilities for the Purchasing staff. Some of these additional duties include scheduling, coordinating, and conducting cardholder training, ordering cards, updating card limits either on a temporary or permanent basis, following up on declined transactions, unlocking cardholder accounts, plus many other administrative tasks.

**Critical Decisions Made by Unit:** The decision was made to purchase an electronic vendor and bid management system to help the Department streamline its bid processes. This system will allow staff to manage the process of issuing, monitoring, conducting evaluations, and awarding bids through an automated system. It is anticipated that the volume of projects will fluctuate and may drastically increase with approval of a new Bond Measure.

**Notable Achievements for Theme C: Secure Human, Technological, & Financial Resources:** Successfully recruited and filled a vacant Buyer position in October 2017. Re-aligned duties of the Purchasing Department by recruiting and filling a second Procurement Specialist position.

**Notable Achievements for Theme D: To Foster an Atmosphere of Cooperation and Collaboration:** 1. Additional P-Cards were issued during the 2017-18 Fiscal Year. There are now 95 individuals utilizing this procurement method, which allows for the purchase of small dollar supply items as well as certain travel-related expenses. 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. Processed over 100 contractor pre-qualification applications, which 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: 5,471

Change Orders: 738

No. of purchases requiring use of Purchasing Credit Card: 288

Bids/RFPs: 35

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<i>Unit Goals</i>	<i>Resources Needed</i>	<i>Where We Make an Impact: Closing the Loop on Goals and Plans</i>
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**Staffing** - Fill vacant Procurement Specialist position due to retirement, in order to provide needed services to the College.  
**Status:** Inactive  
**Goal Year(s):** 2016-17  
**Goal Entered:** 06/23/2016  
**Date Goal Archived/Inactivated:** 07/03/2017

**Completed** - This position was filled in November 2016.

**Improve Efficiencies** - Implement the OnBase Document Management system to manage and store Requisition documentation (e.g. quotes, contracts, W-9s, Insurance, Invoices, etc.)  
**Status:** Active  
**Goal Year(s):** 2016-17, 2017-18, 2018-19  
**Goal Entered:** 06/29/2016

**In Progress** - IT resources are needed to complete the implementation of storing Requisition Documentation.  
**Lead:** Teresa Patterson  
**Type of Request:** IT Support  
**Planning Unit Priority:** Medium  
**Documentation Attached?:** No

**Staff Development** - Continue seeking staff development opportunities to improve job skills and efficiencies for Purchasing staff.  
**Status:** Active  
**Goal Year(s):** 2015-16, 2016-17, 2017-18  
**Goal Entered:** 06/14/2015

**Report directly on Goal**

**Reporting Year:** 2017-18  
**% Completed:** 100  
 Staff continues to attend workshops and meetings, both on and off-campus. Attending these workshops and meetings has helped to increase staff's knowledge related to Public Procurement, as well as other areas such as time-management and customer service skills. (06/19/2018)

**Customer Service** - Continue working towards providing excellent customer service and support to the campus staff.

**Report directly on Goal**

**Reporting Year:** 2017-18  
**% Completed:** 100  
 Staff is continually working towards providing excellent customer service and support to the campus. Staff is

<i>Unit Goals</i>	<i>Resources Needed</i>	<i>Where We Make an Impact: Closing the Loop on Goals and Plans</i>
<p><b>Status:</b> Active  <b>Goal Year(s):</b> 2015-16, 2016-17, 2017-18  <b>Goal Entered:</b> 06/14/2017</p>	<p><b>Report directly on Goal</b></p>	<p>extremely efficient in handling the many urgent requests received weekly (sometimes multiple requests daily). (06/19/2018)</p>
<p><b>P-Card</b> - Provide additional P-Card training in order to expand the program.  <b>Status:</b> Active  <b>Goal Year(s):</b> 2015-16, 2016-17, 2017-18  <b>Goal Entered:</b> 06/14/2017</p>	<p><b>In Progress</b> - Expand P-Card Program  <b>Type of Request:</b> Human Resources, Professional Development  <b>Planning Unit Priority:</b> High  <b>Documentation Attached?:</b> No</p>	<p><b>Reporting Year:</b> 2017-18  <b>% Completed:</b> 100  P-Card training is provided approximately six times per year. There are currently 95 individuals utilizing this procurement method, which allows for the procurement of small dollar supply items, as well as some travel-related expenses. This program benefits the campus by providing a faster, more efficient means of acquiring needed supplies and expediting time-sensitive, emergency purchases. (06/19/2018)</p>
<p><b>Cross Training</b> - Promote cross-training to enhance employee knowledge of other areas.  <b>Status:</b> Active  <b>Goal Year(s):</b> 2015-16, 2016-17, 2017-18  <b>Goal Entered:</b> 06/14/2017</p>	<p><b>Report directly on Goal</b></p>	<p><b>Reporting Year:</b> 2017-18  <b>% Completed:</b> 100  Staff is continually cross-training with each other in order to enhance knowledge of other areas of the department. This has allowed Purchasing to continue providing needed services to the campus during an employee's absence. (06/19/2018)</p>
<p><b>Staffing Resources</b> - Fill vacant Buyer position in order to provide needed services to the College. This vacancy is due to employee promotions.  <b>Status:</b> Archive  <b>Goal Year(s):</b> 2017-18  <b>Goal Entered:</b> 07/03/2017  <b>Date Goal Archived/Inactivated:</b> 07/02/2018</p>	<p><b>Report directly on Goal</b></p> <p><b>In Progress</b> - Recruitment for the Buyer position will begin in July 2017</p>	<p><b>Reporting Year:</b> 2017-18  <b>% Completed:</b> 100  The vacant Buyer position was filled in October 2017. (06/19/2018)</p>
<p><b>Replace Faculty Walk-Up Copiers</b> - 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.  <b>Status:</b> Active  <b>Goal Year(s):</b> 2018-19</p>	<p><b>Full Funding Requested</b> - Replace 1 faculty walk-up copier each fiscal year.  <b>Describe Plans &amp; Activities Supported:</b> To maintain necessary equipment to support faculty, staff, and students for all educational needs</p>	

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<p><b>Goal Entered:</b> 07/02/2018</p>	<p><b>Lead:</b> Teresa Patterson  <b>One-Time Funding Requested (if applicable):</b> 12000  <b>Type of Request:</b> Instructional Equipment  <b>Planning Unit Priority:</b> Medium  <b>Documentation Attached?:</b> No</p>	
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<p><b>Replace Equipment in Printing Svices</b> - 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.  <b>Status:</b> Active  <b>Goal Year(s):</b> 2018-19  <b>Goal Entered:</b> 07/02/2018</p>	<p><b>Full Funding Requested</b> - New equipment is needed to replace the existing 3-hole drill. This equipment is nearing its end of life and replacement parts are becoming difficult to find.  <b>Describe Plans &amp; Activities Supported:</b> Replacing the outdated 3-hole drill will allow the Print Shop to continue providing this service to faculty for printing their instructional materials.  <b>Lead:</b> Teresa Patterson  <b>One-Time Funding Requested (if applicable):</b> 2500  <b>Type of Request:</b> Instructional Equipment, Non-Instructional Equipment  <b>Planning Unit Priority:</b> Medium</p>	
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<p><b>Automate Bid/Vendor Management for Purchasing</b> - Purchasing is in need of automating its Bid/Vendor Management processes. An automated system will streamline the process of issuing, monitoring, conducting bid evaluations, and awarding bids.  <b>Status:</b> Active  <b>Goal Year(s):</b> 2018-19  <b>Goal Entered:</b> 07/02/2018</p>	<p><b>Full Funding Requested</b> - Minimal IT resources will be needed for implementation.  <b>Lead:</b> Teresa Patterson  <b>One-Time Funding Requested (if applicable):</b> 77300  <b>On-Going Funding Requested (if applicable):</b> 23000  <b>Type of Request:</b> IT Support  <b>Planning Unit Priority:</b> High</p>	
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<p><b>Additional Staff for Mail Services -</b></p>	<p><b>Full Funding Requested</b> - 1 full-time</p>	
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<p>Mail Services is requesting one additional full-time 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 2 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 deliveries be made to additional locations, but Mail Services is unable to fulfill those requests with the current staffing levels. Hiring 1 full-time employee will help improve efficiencies and will aid in providing additional customer service to the campus.</p> <p><b>Status:</b> Active  <b>Goal Year(s):</b> 2018-19  <b>Goal Entered:</b> 07/02/2018</p>	<p>and 1 part-time employee to augment the Mail Services staffing.</p> <p><b>Describe Plans &amp; Activities</b>  <b>Supported:</b> Hiring additional staff will provide more efficient mail services to faculty and staff.  <b>Lead:</b> Teresa Patterson  <b>One-Time Funding Requested (if applicable):</b> 70000  <b>On-Going Funding Requested (if applicable):</b> 70000  <b>Type of Request:</b> Staffing  <b>Planning Unit Priority:</b> High</p>	
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<p><b>Business Cards</b> - Increase funding for Business Cards due to an increased number of new hires and additional business card orders. The amount requested is based on a three-year average increase in total spending.</p> <p><b>Status:</b> Active  <b>Goal Year(s):</b> 2018-19  <b>Goal Entered:</b> 07/17/2018</p>		
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