



**Laurie Rozko**  
Interim Director

**Mission Statement**

*The Purchasing Department is dedicated to managing for our customers the most cost-effective and efficient procurement of quality goods and services in support of the County of San Bernardino mission and goals. We will accomplish this through exceptional customer service, innovative processes, and sound business practices.*



**GOALS**

**EXPAND TRAINING FOR PROCUREMENT AND INTERNAL SERVICE PROCEDURES**

**INCREASE THE NUMBER OF ACCREDITED BUYERS**

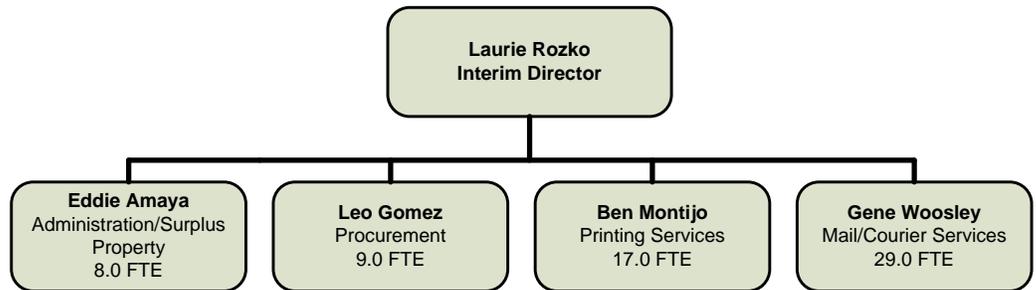
**STREAMLINE THE REQUEST FOR PROPOSAL PROCESS**

**IMPLEMENT A COUNTY TRAVEL WEBSITE**

**INCREASE SURPLUS PROPERTY SALES**

**PURCHASING**

**ORGANIZATIONAL CHART**



**DESCRIPTION OF MAJOR SERVICES**

The Purchasing Department is responsible for the acquisition of equipment, services, and supplies used by county departments and special districts under the governance of the Board of Supervisors. In addition, certain services are available to outside agencies and municipalities. Purchasing manages three internal service programs—Printing Services, Surplus Property and Storage Operations, and Mail/Courier Services.

The Purchasing Department strives to provide outstanding service to all customers by acting with integrity; providing quality products with reasonable prices and timely deliveries; offering progressive services and the effective use of automation; giving all willing vendors the opportunity to provide pricing on their products and services in a fair, open, and competitive environment; and by treating each department, employee, and vendor with respect and understanding. By meeting these objectives, the Purchasing Department fulfills the purchasing responsibility and legal requirements of the County of San Bernardino.

**2007-08 SUMMARY OF BUDGET UNITS**

	Operating Exp/ Appropriation	Revenue	Local Cost	Revenue Over/ (Under) Exp	Staffing
<b>General Fund</b>					
Purchasing	1,307,588	50,000	1,257,588		15.0
Total General Fund	1,307,588	50,000	1,257,588		15.0
<b>Internal Service Funds</b>					
Printing Services	3,665,519	3,708,849		43,330	18.0
Surplus Property and Storage Operations	4,645,121	4,706,000		60,879	5.0
Mail/Courier Services	7,067,755	7,093,188		25,433	30.0
Total Internal Service Funds	15,378,395	15,508,037		129,642	53.0
<b>Total - All Funds</b>	<b>16,685,983</b>	<b>15,558,037</b>	<b>1,257,588</b>	<b>129,642</b>	<b>68.0</b>



Central Mail Logo



Printing Services Logo



Surplus Property & Storage Operations Logo

## GOALS, OBJECTIVES, AND PERFORMANCE MEASURES

### GOAL 1: EXPAND THE PURCHASING TRAINING PROGRAM FOR PROCUREMENT AND INTERNAL SERVICE FUND POLICIES AND PROCEDURES

*Objective A: Prepare Purchasing staff to conduct training at department sites.*

*Objective B: Advertise training on Countyline, by email, and through payroll inserts.*

*Objective C: Survey county employees who have attended the training to receive feedback.*

MEASUREMENT	2005-06 Actual	2006-07 Actual	2007-08 Target	2007-08 Estimate	2008-09 Target
1A. Percentage of County departments that receive training sessions. (64 departments)	N/A	.05%	16%	50%	80%

#### Status

This goal reflects the Purchasing Department's effort to fully inform county departments of its core mission and services. Training focuses on specific topics that have been chosen by user departments, and is conducted in small groups for no longer than two hours. The training is free of charge and is presented at the requesting department's work location whenever possible. Through the Single Point of Contact (SPOC), the procurement staff is providing training sessions to their assigned departments and establishing a regular training schedule to be used throughout the year. The goal of the training is more efficient procurement, policy compliance, and increased usage of the Department's three Internal Service Funds - Printing Services, Surplus Property and Storage Operations, and Mail/Courier Services. By capturing the percentage of County departments that receive training sessions, the Purchasing Department will ensure that departmental staff, including newly assigned employees, is trained on an ongoing basis.

### GOAL 2: INCREASE THE NUMBER OF BUYERS THAT EARN THE C.P.M. ACCREDITATION WITHIN THE PURCHASING DEPARTMENT

*Objective A: Acquire training materials from the Institute of Supply Management or attend classes conducted by the California Association of Public Purchasing Officers (CAPPO).*

*Objective B: Set up a departmental training program whereas buyers will be able to study for the C.P.M. examination during designated study times.*

*Objective C: Have buyers take and pass appropriate exams for Certified Purchasing Manager accreditation.*

MEASUREMENT	2005-06 Actual	2006-07 Actual	2007-08 Target	2007-08 Estimate	2008-09 Target
2C. Percentage of buyers that have earned the C.P.M. accreditation (current staff is 9 buyers).	N/A	22%	20%	22%	33%

### 2006-07 ACCOMPLISHMENTS

- ❖ *Recipient of the "Achievement of Excellence in Procurement" Award from the National Institute of Governmental Purchasing*
- ❖ *Closed Central Stores and successfully instituted Just-in-Time direct shipments to departments*
- ❖ *Enhanced procurement for County departments by increasing purchasing limits*
- ❖ *Automated the vendor registration process on the internet to capture more data and electronically contact vendors, in order to provide better vendor lists to departments and expand product offerings*
- ❖ *Expanded the CAL-Card Program countywide, to expedite purchasing of and payment for low-value items*
- ❖ *Offered departments a Single Point of Contact (SPOC) for user-friendly purchasing service*



Status

The Purchasing Department encourages staff to acquire professional certifications. Currently, two buyers are C.P.M. accredited. For buyers, this accreditation is nationally accepted as a standard of competence and knowledge for the purchasing and supply management field. Classes conducted by CAPPO, along with the establishment of a departmental training program, will enable buying staff to pass the appropriate examinations and become C.P.M. qualified. The result of this goal will be the most professional, qualified, and knowledgeable staff that are fully trained in all county, state, and federal purchasing laws.

**GOAL 3: STREAMLINE THE REQUEST FOR PROPOSAL (RFP) PROCESS FOR COUNTY DEPARTMENTS**

*Objective A: Standardize two RFP templates (one for services and one for supplies).*

*Objective B: Post and regularly update templates on the Purchasing website for countywide access.*

Status

This was presented as Goal 4 in 2006-07. Multiple RFP formats are being used in county departments. By creating templates, the process of preparing RFP's and awarding contracts will be more efficient and accurate, with less risk of legal issues and appeals. Templates are expected to be completed by spring 2008 and will be updated continuously as needed. Departments will be notified of any significant changes to the templates through county email and by their SPOC.

The performance measure from this goal was removed because it does not accurately reflect the Purchasing Department's activity. Purchasing staff work with departments on a weekly basis to assist them with their RFPs. The measure for 2006-07 measured changes posted to the template. Posting changes for departmentally specific reasons or changes made from mandates are not necessarily indicators of a streamlined system. Therefore, Purchasing will retain this as a goal in 2008-09 and evaluate the process for future quantifiable measurements.

Removal of 2006-07 Goal

Goal 3, from the 2006-07 Business Plan (Re-advertise the Capabilities of the Intelligent Inserting of Mail to County Departments and any Outside Agencies and Municipalities), was removed. The reason for the removal is due to the fact that information regarding Mail/Courier Services was incorporated into the Purchasing Training Program.

**GOAL 4: IMPLEMENT THE COUNTY TRAVEL WEBSITE FOR COUNTY BUSINESS TRAVEL**

*Objective A: Arrange contractual agreements with rental car, airline, and hotel vendors.*

- *Develop an intranet travel portal*
- *Advertise the county travel website to employees*
- *Generate management reports regarding travel*

*Objective B: Work with the County Administrative Office to update travel policies.*

MEASUREMENT	2005-06 Actual	2006-07 Actual	2007-08 Target	2007-08 Estimate	2008-09 Target
4A. Percentage of County departments that are using the travel website (64 departments).	N/A	N/A	N/A	N/A	40%

Status

This is a new goal for 2008-09, to garner savings by consolidating purchasing, with an objective of establishing various contractual agreements over a two-year period. By utilizing existing volume purchasing contracts and exploring options to negotiate with other vendors, lower rates will be obtained with travel vendors whenever possible. The County Travel Website will provide reservation services through a travel portal on the Purchasing intranet site, allowing for CAL-Card purchases or direct billing. A primary result of this initiative is to generate management reports regarding county travel expenditures, by department, to ensure that departments are receiving the maximum return on their investment in travel.

**GOAL 5: INCREASE COUNTY SURPLUS PROPERTY SALES**

*Objective A: Create the webpage on the Purchasing Department intranet website for internal county sales.*

- *Enable online viewing, inquiries, and purchases*
- *Re-use surplus property within the county*
- *Increasing throughput in the warehouse*
- *Advertise the webpage to county employees*

*Objective B: Use the internet auction site Public Surplus for external public sales*

- *Increase departmental revenue*
- *Enable online viewing, bidding, and purchases*
- *Minimize labor costs and logistical complications related to live auctions*
- *Advertise the website and online auctions to potential bidders*

MEASUREMENT	2005-06 Actual	2006-07 Actual	2007-08 Target	2007-08 Estimate	2008-09 Target
5A. Percentage of county departments that are purchasing surplus property. (64 departments).	N/A	N/A	N/A	N/A	25%
5B. Percentage of public auctions that result in sale on Public Surplus website. (Baseline 400)	N/A	N/A	N/A	N/A	25%

Status

This is a new goal for 2008-09. This goal represents a commitment to improve customer service in regards to the Purchasing Department's mandate to dispose of county surplus property in a cost effective manner. Currently, county departments must view surplus property at the Purchasing Department's warehouse. Departments tag property and arrange for pickup. Upon implementation of a Surplus Property Webpage, surplus property will be available first to county departments, then community-based organizations (in conjunction with Human Services), and finally auction vendors, in accordance with County Policy 11-09.

In addition, the department has begun selling surplus information technology equipment on the internet auction website Public Surplus. The general public can now purchase equipment, remit payment, and claim it at the warehouse.

Removal of 2006-07 Goal

Goal 5, from the 2006-07 Business Plan (Create an Interactive Requisition Form), was removed. Purchasing posted this form on our intranet web page. It's titled "Requisition Form". The form is interactive; you can fill it out online, and submit it to the Purchasing Department along with your quotes. We are still working on finding out what departments are using the interactive form. This will be completed by the end of the fiscal year.

**2008-09 REQUESTS FOR ADDITIONAL GENERAL FUND FINANCING (POLICY ITEMS), INCLUDING NEW CAPITAL IMPROVEMENT PROGRAM (CIP) PROJECTS, OR BUSINESS PROCESS IMPROVEMENT (BPI) RESERVE FUNDS**

	Budgeted Staffing	Appropriation	Dept. Revenue	Local Cost
1. Additional staffing for CAL-Card, Travel Website, and Printing Services (Policy Item)	1.0	40,962	10,241	30,721

The countywide expansion of the CAL-Card Program and initiation of the county travel website necessitates an additional clerical support position. The department is requesting an additional Office Assistant II (OA II) to respond to emails and phone calls regarding the CAL-Card guidelines, process applications, schedule training, and destroy canceled cards. In addition, the OA II will support the travel website program by maintaining daily automated logs, responding to inquiries, and generating monthly reports. The OA II will also support the ARMC forms program and database on a daily basis. This position would also coordinate with Printing Services regarding a variety of advertising initiatives for these same programs.

MEASUREMENT	2005-06 Actual	2006-07 Actual	2007-08 Target	2007-08 Estimate	2008-09 Target
1. Percentage of departments utilizing both the CAL-Card and the county travel website.					50%

**2008-09 PROPOSED FEE ADJUSTMENTS**

The department is not requesting any proposed fee adjustments for 2008-09.

If there are questions about this business plan, please contact Laurie Rozko, Interim Director, at (909) 387-2074.