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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

ASSIST VENDORS WITH OPPORTUNITIES TO COMPETE FOR COUNTY BUSINESS

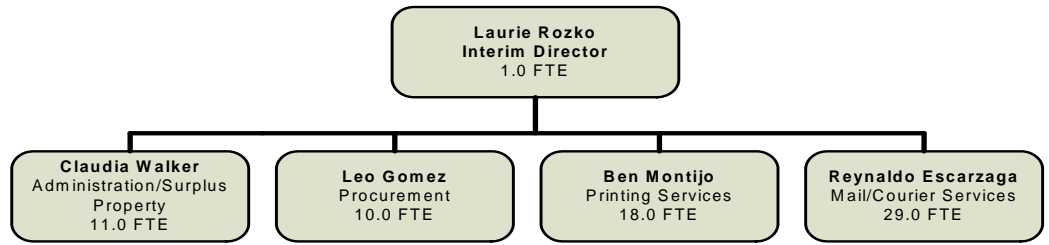
DEVELOP AN ENVIRONMENTALLY PREFERABLE PURCHASING POLICY

WEBSITE REDESIGN TO INCREASE THE FLOW OF INFORMATION

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.

2008-09 SUMMARY OF BUDGET UNITS

	Operating Exp/ Appropriation	Revenue	Local Cost	Revenue Over/ (Under) Exp	Staffing
General Fund					
Purchasing	1,436,783	184,143	1,252,640		18.0
Total General Fund	1,436,783	184,143	1,252,640		18.0
Internal Service Funds					
Printing Services	4,148,499	4,159,689		11,190	19.0
Surplus Property and Storage Operations	367,700	372,700		5,000	3.0
Mail/Courier Services	7,384,760	7,386,411		1,651	29.0
Total Internal Service Funds	11,900,959	11,918,800		17,841	51.0
Total - All Funds	13,337,742	12,102,943	1,252,640	17,841	69.0



Central Mail Logo



Printing Services Logo



Surplus Property & Storage Operations Logo

GOALS, OBJECTIVES, AND PERFORMANCE MEASURES

GOAL 1: EXPAND TRAINING FOR PROCUREMENT AND INTERNAL SERVICE FUND (ISF) POLICIES AND PROCEDURES.

Objective A: Conduct in-house procedural training at department sites.

Objective B: Offer relevant training regarding contracting and procurement to user departments.

Objective C: Survey user departments to receive feedback.

MEASUREMENT	2006-07 Actual	2007-08 Actual	2008-09 Target	2008-09 Estimate	2009-10 Target
1A. Percentage of County departments that receive annual training sessions. (64 departments)	.05%	18.5%	80%	80%	85%

Status

This goal reflects the Purchasing Department's effort to improve service to user departments through efficient procedures, policy compliance, and increased usage of the department's three Internal Service Funds. Training in small groups at the requesting departments' work locations focuses on specific topics that have been identified by users. Through the Single Point of Contact (SPOC), procurement staff is providing training sessions to their assigned departments and establishing a regular training schedule throughout the year. By capturing the percentage of county departments that receive training sessions each year, Purchasing will ensure that all staff, including newly assigned employees, is trained on an ongoing basis.

GOAL 2: ASSIST VENDORS IN IDENTIFYING OPPORTUNITIES AND COMPETING FOR COUNTY BUSINESS.

Objective A: Upgrade the automated vendor registration to be more user friendly and allow for the upload of insurance information and certificates.

Objective B: Provide informational modules for online viewing, focusing on how to do business with the county.

Objective C: Lease web-based software to enable online bidding.

Objective D: Increase bid notifications to vendors based on commodity codes they select during the registration (or update) process.

Objective E: Assist the Auditor/Controller-Recorder (ACR) in registering vendors for Electronic Fund Transfers and ePayables options.

Objective F: Survey vendors to receive feedback.

MEASUREMENT	2006-07 Actual	2007-08 Actual	2008-09 Target	2008-09 Estimate	2009-10 Target
2A. Percentage of vendors providing survey feedback.	N/A	N/A	New	4%	15%

Status

This is a new goal for the 2009-10 fiscal year to emphasize the department's focus on finding the most economical solutions for county departments, maintenance of an effective and responsive vendor pool, and success for local businesses in opportunities to secure county business. Staff is committed to in making the vendor registration process as user friendly as possible, continually enhancing the shared information that is available to all users, and adding features that facilitate the bidding process on both sides. It is important that Purchasing works collaboratively with other service departments, such as the ACR to maximize automated processing of various transactions, and that we continually solicit and receive feedback from our county vendors.

2007-08 ACCOMPLISHMENTS

- ❖ Received the "Achievement of Excellence in Procurement" Award from the National Institute of Governmental Purchasing
- ❖ Implemented the automated billing system in Mail Services to improve accuracy, timeliness and reporting for user departments
- ❖ Revised Purchasing Policies to enhance procedures for non-competitive procurements
- ❖ Provided vendor training at the Ontario Convention Center in conjunction with the Small Business Association (SBA) Day and Procurement Fair
- ❖ Continued expansion of the CAL-Card Program, replacing assigned bank cards, and authorizing additional buying categories
- ❖ Initiated surplus property sales on the internet to increase revenue and re-use of computer equipment
- ❖ Standardized purchase order language to reduce errors and change orders

GOAL 3: DEVELOP AN ENVIRONMENTALLY PREFERABLE PURCHASING POLICY.

Objective A: Strengthen the Green County initiative by identifying target product categories for green purchasing.

Objective B: Minimize the use of hazardous and toxic materials in county operations.

Objective B: Conduct vendor shows featuring green products for departmental users.

MEASUREMENT	2006-07	2007-08	2008-09	2008-09	2009-10
	Actual	Actual	Target	Estimate	Target
3A. Percentage of recycled or recyclable-content office supply purchases.	N/A	N/A	New	33%	38%

Status

This is a new goal for the 2009-10 fiscal year to acknowledge the goal of spending taxpayer money on products that are not harmful to the environment, including an effort to minimize the use of hazardous and toxic materials. It is essential that an Environmentally Preferable Purchasing Policy be cost effective and that the goals are fiscally sensible. Such a plan would work in tandem with other county policies and initiatives directed as energy efficiency, fuel efficiency, recycling, water conservation, green building and emissions reduction. The department envisions a policy that is incorporated in the bidding process, contemplates applicable standard contract language, applies to county departments and other organizations doing business with the county, and allows for progress reporting.

GOAL 4: ENHANCE DESIGN OF THE PURCHASING DEPARTMENT WEBSITE TO INCREASE INTERACTIVITY AND BROADEN THE FLOW OF INFORMATION.

Objective A: Provide quick accessibility to purchasing information and services in all divisions.

- *Improve website navigation.*
- *Enable the department to easily maintain its site.*
- *Highlight services provided by the department's internal service divisions.*
- *Facilitate customer and vendor (internal and external) contact with Purchasing staff.*

Objective B: Create a travel portal with information and procedures.

- *Consolidate travel procedures in one location.*
- *Negotiate contractual options for travel when possible.*
- *Work with the County Administrative Office to update travel procedures.*

Objective C: Provide space for growth, to add leased software that can provide desired functionality.

- *Enable online requisitioning for county users.*
- *Link automated billing systems for internal services.*
- *Create interface to submit electronic printing orders.*
- *Improve vendor support as outlined in Goal 2.*
- *Design portals for vendors to input data for departmental reporting (e.g. recyclable products).*
- *Identify future opportunities to upload data collected in the Financial Accounting System (FAS).*

Objective D: Facilitate surplus property sales/re-use.

- *Link to the Public Surplus internet auction site, with online viewing, bidding and purchasing.*
- *Enable online inquiries to the surplus warehouse from county departments.*

Status

This goal has been expanded to encompass the department's overall website. The emphasis on travel will be to deliver countywide information in one location and incorporate cost-saving contractual travel arrangements whenever possible. Due to economic hardships, travel-related businesses are not able to negotiate further reductions at this time. Staff will continue to pursue low-cost travel alternatives for county departments as the business environment improves.

In general, this goal represents a commitment to customer service. Changes to the overall website will include a variety of additional links and search capabilities to locate information and tools such as forms and statements of account. The

site will be designed for easy maintenance and the later addition of electronic procurement functions such as web-based bidding and requisitioning. Interfaces with automated billing and/or ordering systems in mail and printing services are a priority, along with portals to collect needed data from vendors for reporting purposes. The department also envisions streaming video to offer procurement training. In general, the theme of this goal is efficiency through automation.

GOAL 5: INCREASE COUNTY SURPLUS PROPERTY SALES.

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

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

Status

With regard to the department's mandate to dispose of county surplus property in a cost effective manner, this goal reflects an effort to maximize efficiency and revenue from equipment purchased with public funds. Through this effort, the general public is able to purchase equipment online, and remit payment and claim property at the warehouse.

Surplus property is 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.

MEASUREMENT	2006-07 Actual	2007-08 Actual	2008-09 Target	2008-09 Estimate	2009-10 Target
5A. Percentage of auctions resulting in sales on the Public Surplus website (Baseline 400).	N/A	N/A	40%	50%	55%

2009-10 REQUESTS FOR ADDITIONAL GENERAL FUND FINANCING

Brief Description of Business Process Improvement reserve funds request	Budgeted Staffing	Appropriation	Dept. Revenue	Local Cost
1. Lease web-based software to automate, track, and expedite bidding and tabulation, submittal of requisitions, and electronic purchase orders. (BPI Request) Currently, Purchasing issues bids manually, user departments submit paper requisitions, and buyers utilize several different systems to track purchase orders. Lease of the software would enable the department to automate and track several processes, and ultimately increase the speed with which requests are completed. No additional staff is needed to implement the software. The selected vendor would host and maintain service on their servers. One-time costs are estimated at \$50,000 for systems development to create necessary interface functions. Lease costs would be funded with departmental revenue or vendor fees.		\$150,000	\$100,000	\$50,000

MEASUREMENT	2006-07 Actual	2007-08 Actual	2008-09 Target	2008-09 Estimate	2009-10 Target
P1. Average number of requisitions processed per buyer.				300	330
P2. Percentage of requisitions processed within 10 business days. Processing is defined as the time period from receipt of the requisition by Purchasing to the date it is mailed to the vendor. Out of a total of 3,000 requisitions received in 2007-08, approximately 30% could not be processed immediately due to missing information, policies not being followed, funding not in place, vendor not registered, or requisition requests withdrawn. Based on procedural improvements designed to reduce the number of incomplete requisitions, and also efficiencies that would be created with a web-based submittal system, the department's goal would be to consistently process 75% of all requisitions within 10 business days.					75%

2009-10 PROPOSED FEE ADJUSTMENTS

The department is not requesting any proposed fee adjustments for 2009-10.

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