



Mt. San Antonio College Planning for Institutional Effectiveness (PIE) 2006-07



Department/Unit:	<input type="text" value="Purchasing Department / Purchasing"/>	Division:	<input type="text" value="Administrative Services"/>	
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Note: Departments with multiple disciplines and/or programs need to submit additional PIE packets as needed to represent planning in different disciplines.

Institutional Planning Framework

1. Institutional Mission

The campus is unified through its demonstrated connection to the mission. Driven by the California Master Plan for Higher Education, revised by the President's Advisory Council, and approved by the Board of Trustees, it informs all planning and assessment.

The Mission of the College is to

- provide accessible and affordable quality learning opportunities in response to the needs and interests of individuals and organizations;
- provide quality transfer, career, and lifelong learning programs that prepare students with the knowledge and skills needed for success in an interconnected world; and
- advance the State and region's economic growth and global competitiveness through education, training, and services that contribute to continuous workforce improvement.

2. College Goals

College goals allow the campus to focus on critical issues. Articulated by the President's Advisory Council, they guide all planning and assessment processes. Goals are listed below as current and ongoing goals, retaining the lettering used in the 2005-06 process. This division of goals may be useful in that the goals for current focus are more concrete than the ongoing goals and perhaps easier for us to document progress.

Current focus:

- B. The College will secure funding that supports exemplary programs and services.
- C. The College will prepare students to be critically thinking, socially, culturally, and politically responsible citizens through the development of exemplary programs
- D. The College will improve career/vocational training opportunities to help students maintain professional currency and achieve individual goals.
- E. The College will improve the quality of its partnerships with business and industry, the community, and other educational institutions.
- H. The College will utilize technology to enhance teaching and learning and to provide support for educational programs.
- I. The College will provide an environment for consciousness of diversity while also providing opportunities for increased diversity and equity for all across campus.

Ongoing goals:

- A. The College will provide a risk-free environment for the measurement of SLOs under the umbrella of Planning for Institutional Effectiveness.
- F. The College will become a nationally recognized institution of higher education that embraces an atmosphere of self-reflective dialogue in making policies and plans and in communications.
- G. The College will provide a risk free environment for the measurement of AUOs related to Planning for Institutional Effectiveness.
- J. The College will embrace an environment of mutual respect and integrity that encourages the exchange of ideas and acknowledges and values contributions made by members of the College community.

3. Internal/External Conditions

Consideration of internal and external conditions is the basis of department/unit planning and assessment processes.

3a. Identify those external conditions that have influenced the department/unit goal-setting process:

Note: External conditions include disciplinary or regulatory changes, changes in technology or legislative changes, accreditation recommendations, enrollment issues, advisory committee input, etc.

There are many EXTERNAL CONDITIONS which could and do influence the Purchasing unit of the Purchasing Department, including the following (Listed examples are illustrative only, and not comprehensive of all impacts):

1. Changes in State funding of educational programs and/or bonds.
 - In FY 2006/07, we received over \$8 million in one-time money, some of which will carry over into FY 2007/08. A large part of this money is allocated for equipment and furniture purchases not supported in basic department budgets, which results in increased orders, formal bids, and Board agendas to process.
 - Annual educational budget and grant programs: After several years of budget cutbacks, the State has recently increased its monies to the College, which is being seen in increased expenditures from grant monies as well as the General Fund.
 - Construction bonds like Prop 47 & Prop 1A bonds of past years, which we are using in conjunction with our Measure R Bond to fund campus-wide facilities improvements. This trend is continuing with the passage of last November's Prop 1E infrastructure bond which should provide at least \$15 million for the College's capital facilities projects.
2. Federal or state-mandated changes.
 - GASB 34/35 requirements necessitate improvement in fixed asset management and designation of depreciation schedules for capital assets.
 - Last year's opinion by the State's Attorney General has immediate impact on use of piggyback bids for the purchase of modular buildings. LACOE has increased its audits of piggyback usage for all procurements.
 - Full implementation of legislated change in purchasing goods with recycled content and reporting of same to Integrated Waste Management Board has not yet been required of CCDs, but should be followed as it is on the Governor's agenda.
3. National and international economic markets conditions influence the price we pay for goods and services.
 - Oil price increases impact manufacturing & transportation costs as reflected in higher prices for purchase and delivery of goods.
 - Mergers and acquisitions are decreasing competitive vendors in a number of areas; e.g. scientific equipment, office supplies, cell site operators.
4. Advances in technology
 - The rise in on-line purchasing and the decline in the number of vendors who accept traditional purchase orders is requiring consideration of procurement card programs.
 - Copiers are now capable of being an integral component of desktop and institutional information infrastructure, creating new communication opportunities and significant cost savings if copier management is centralized in a single program.
 - Increased use of cell phones causing radical change in pay phone industry.

3b. Identify those internal conditions that have influenced the department/unit goal-setting process.

Note: Internal conditions include results of previous SLOs/AUOs assessment, IT data, changes in technology, changes in budget, staffing, resources, enrollment issues, facilities issues, etc.

There are many INTERNAL CONDITIONS which could and do influence the Purchasing unit of the Purchasing Department, including the following (Listed examples are illustrative only, and not comprehensive of all impacts):

1. Budget increases/decreases which influence the amount of goods and services purchased, the number of College staff requiring furniture and equipment, and the number of Purchasing staff to provide procurement services.
 - Categorical or instructional equipment expenditures requiring Board approval have increased more than 100% over the last 2 years.
 - Increase in furniture and equipment orders associated with new faculty hires and capital projects.
 - Purchase orders for all goods and services have steadily risen for the past 4 years and now exceed levels prior to the FY 2002/03 budget cuts.
 - Staffing has not increased commensurate with the growth in workload. The FY 2002/03 staff reductions due to loss of hourly workers were partially mitigated by creating 1 clerical position (recently reclassified to a Purchasing Clerk I). One-time funding was allocated for 1 temporary position through 6/30/07, and Banner funding has been allocated to fund 1 temporary position through 12/30/07. On-going funding requests for 1 Purchasing Specialist and 1 Purchasing Clerk 1 are awaiting approval.
2. Large programs for capital asset acquisitions (e.g. Measure R bond, President's Capital Projects fund-raising) which increase the number of formal bids to be processed and contracts to be managed.
 - Number of contracts has grown from 2-5 annually to 30-40 annually, with further increases expected for next 7-8 years due to additional revenues from State and local bond measures.
 - Purchasing manhours focused on this effort has grown from 10-15 hours per week to more than 100 hours per week, partially mitigated by changing the 19-hour clerical assignment to full-time.
 - State-wide CCD survey of Purchasing staff for such programs is similar to ours: other colleges either add Purchasing staff (1 to 2 persons), create a dedicated Purchasing unit within Facilities (1 to 2), or subcontract the work out to Project Management firms.
3. Changes in technology significantly impact Purchasing processes.
 - Implementation of new ERP system for purchasing and fixed asset modules requires extensive Purchasing staff training, but should decrease data entry and improve real-time reporting.
 - The new ERP system will require Purchasing to develop and implement campus-wide training for on-line requisitions and to staff an on-going "help" desk to assist employees in their use of Purchasing, Receiving, Stores, and Fixed Asset modules.
 - On-line purchasing opportunities and the decline in the number of vendors who accept traditional purchase orders have resulting in a tremendous growth in staff using personal funds to purchase District supplies, equipment and services – a practice that can be curtailed with the implementation of a procurement card program.
 - Implementation of a copier program would reduce contract management from 100+ to 1, and create savings of >\$100,000 per year.
4. Need to communicate Purchasing procedures and other information to the campus and community.
 - Development of College's intranet and internet affords better opportunities for effective communication.
 - Improvement of decentralized and inconsistent contracts is an on-going need.

DEPARTMENT/UNIT PLANNING PROCESS

Note: For assistance with the SLOs/AUOs process, please contact the SLOs/AUOs Team Coordinator, Jemma Blake-Judd X3934

4. Department/Unit Goals

Department/Unit goals allow the area to focus its priorities. Prompted in part by College goals and generated by faculty/staff, they guide area planning and assessment.

Goals:

4a. List a MINIMUM OF TWO GOALS to be addressed through the SLOs/AUOs process. Please do not list outcomes statements here. When appropriate, identify the connection of your goals to the College goals.

1. Assure that current Purchasing processes provide a satisfactory level of service to the campus and community. (G, J) **(AS Priority 1-5)**

4b. List a MAXIMUM OF THREE goals that will not be assessed through the SLOs/AUOs process. When appropriate, identify the connection of your goals to the College goals.

1. Assure sufficient staffing and appropriate job classifications for Purchasing staff to provide satisfactory level of service for current work and anticipated changes. (I, J) **(AS Priority 1, 2, 5)**
2. Implement ERP software modules for purchasing and fixed assets to enhance institutional effectiveness. (E, H) **(AS Priority 2, 3, 4, 5)**
3. Establish and perform campus-wide training in on-line requisitioning for stores and regular purchases, and provide permanent "help" desk to assist campus users. (D, E, H) **(AS Priority 2, 3, 4, 5)**
4. Establish and manage procurement card program to enhance institutional effectiveness. (E, H) **(AS Priority 3, 4, 5)**
5. Provide and maintain current information about Purchasing and its processes to the campus and community. (E, H) **(AS Priority 3, 4, 5)**
6. Establish a campus-wide copier program. (B, C, E, F, H) **(AS Priority 1, 3, 4, 5)**

5. SLOs/AUOs

SLOs/AUOs are a means of evaluating and validating area/program effectiveness. Created and assessed by department /unit faculty/staff, they can inform planning.

5a.

Intended Outcomes (SLOs)	Means of Assessment and Criteria for Success	Summary of Data Collected	Use of Results
	Not Applicable		

Note: *Administrative Unit Objectives* (AUOs) are expressed as statements of what clients experience, receive, or understand as a result of a given service. The purpose of this assessment process is to improve the unit's service.

5b.

Intended Objectives (AUOs)	Means of Assessment and Criteria for Success	Summary of Data Collected	Use of Results
<p>The PURCHASING unit will provide timely and cost-effective service in the procurement of goods and services needed campus-wide.</p>	<p>Conduct a customer satisfaction survey, created by Purchasing and administered by Office of Research & Institutional Effectiveness in Fall 2006. Success is defined as an 80% response rate of agree or strongly agree on all survey questions.</p>	<p>Survey conducted September 2006</p> <p>Total Responses: 163; 44% of which interface daily or weekly; 61%-classified, 26%-faculty, 13%-managers</p> <hr/> <p>Survey tool was flawed; 20% marked 'No Opinion' which did not indicate satisfaction or not with measured criteria.</p> <hr/> <p>Promptness: 63.8% agree (+) and 13.5% disagree (-) Accuracy: 70.6%(+) and 6.1% (-) Attitude: 73%(+) and 3.1%(-) Overall Satisfaction: 72%(+); 9.8%(-)</p> <hr/> <p>Of the 50 comments received, 38 were suggestions/requests for:</p> <ul style="list-style-type: none"> 27 – faster & access to data 4 – written procedures 3 – credit card 2 – Buyers, not requesters, doing more research & pricing 	<p>With 20% of survey results unavailable, it was not possible to achieve 80% success rate. If the 'No Opinion' group is considered to have no issues, then the acceptance rate increases to defined success levels.</p> <p>Refine survey so next time all results can be measured.</p> <p><u>Response to Comments:</u> Promptness is the the biggest issue. The current manual requisition and approval process is being replaced with Banner, a web-based program which will allow requester access to real-time information about each purchase – the Purchasing module goes live 12/1/07.</p> <p>Campus-wide training will start in August 2007 and will be on-going. SIG/Sungard will assist initially; then, IT & Purchasing will perform ongoing workshops.</p> <p>Procedures: A new Purchasing procedures workshop was created and the first of two sessions per year was held on March 15, 2007. At the same time, the 'Purchasing Made Simple' user guide was released. Great positive feedback.</p> <p>The P-card (credit card) program is part of Banner implementation and is currently being developed for release to coincide with the start of Banner Finance.</p> <p>These changes not only address the major issues revealed in this survey, but will also create production efficiencies so PURCHASING staff can focus on value-added service like providing more technical and pricing research to its customers.</p>

5c. Goal Implementation

Goal implementation is a non-evaluative process necessary to achieve the area goals. Determined by faculty/staff, goal implementation facilitates planning.

Department/Unit Goal	Responsible Parties	Implementation Timeline	Status of Implementation		
			Planning	Implementing	Completed
(4b.1) Assure sufficient staffing and appropriate job classifications for Purchasing staff to provide satisfactory level of service for current work and anticipated changes. (Goals I, J) (AS Priority 1, 2, 5)	M. Young M.Gregoryk HR	On-going		Clerical Specialist reclassified to Purchasing Clerk 1 – S. Horn	March 2007
				Reassigned night Switchboard operator to days & funded hourly to work nights to provide daytime clerical support to Purchasing	Sept 2007
				One-time funding approved \$35k thru 6/30/07 PSA contract – S. Chambers Assignment: clean-up fixed asset records, contract support	
				Banner funding approved 1 position thru 12/30/07 PSA contract - Linda Oddie Assignment: PO processing & Banner support as needed	
			Ongoing fundiing requests for Purch Specialist & Purch Clerk I submitted 1/15/07		

	Department/Unit Goal	Responsible Parties	Implementation Timeline	Status of Implementation		
				Planning	Implementing	Completed
	(4b.3) Establish and perform campus-wide training in on-line requisitioning for stores and regular purchases, and provide permanent "help" desk to assist campus users. (Goals D, E, H) (AS Priority 2, 3, 4, 5)	M. Young Purch Staff IT Staff	2007	Just-in-time training for requisitioners scheduled for Fall 2007 under IT oversight.		
	(4b.4) Establish and manage procurement card program to enhance institutional effectiveness. (Goals E, H) (AS Priority 3, 4, 5)	M. Young L. Baldwin	2007	Committee established, plans reviewed & one selected. Contract negotiations pending & Banner coordination TBD.		
	(4b.5) Provide and maintain current information about Purchasing and its processes to the campus and community. (Goals E, H) (AS Priority 3, 4, 5)	M. Young Marketing POD IT	2007	User Guide created & first Purchasing workshop held thru POD on 3/15/07. Coordination with Banner requisition training currently in planning with IT.		Ongoing – biannual workshops planned
In process of identifying appropriate intranet & internet content.						
	(4b.6) Establish a campus-wide copier program. (Goals B, C, E, F, H) (AS Priority 1, 3, 4, 5)	M. Young V. Belinski	2007	Consultant approved 2/28/07. Phase 1: onsite survey 3/30/07, report due 4/30/07. Phase 2 – RFP & contract award and Phase 3 – program implementation pending.		

6. Resources

Resources support achievement of goals. Requested by department/unit faculty/staff, they directly support plan implementation.

Note: Resources include: research support, budget allocation, training, instructional equipment, marketing, staffing (classified, faculty, and/or management positions), facilities, etc.

Department/Unit Goal	Resources Needed?		If yes, please list resources needed
	Yes	No	
(4b.1) Assure sufficient staffing and appropriate job classifications for Purchasing staff to provide satisfactory level of service for current work and anticipated changes. (Goals I, J) (AS Priority 1, 2, 5)	X		<ul style="list-style-type: none"> • Approval and funding of on-going request for Purchasing Specialist - \$68,824 annual salary + benefits • Approval and funding of on-going request for Purchasing Clerk I (\$59,818). • Increase annual hourly budget by \$5,000 – total \$10,027 to provide necessary clerical support (Acct: 01.0-00000.0-90000-84000-2310-6771000) <p>OR</p> <ul style="list-style-type: none"> • Support from IT to continue funding temporary Buyer (Linda Oddie) thru June 2008 – annual total \$81,120. • Continue to approve and fund temporary Contract Administrator thru June 2008 – annual total \$85,527. • Increase annual hourly budget by \$5,000 – total \$10,027 to provide necessary clerical support (Acct: 01.0-00000.0-90000-84000-2310-6771000)
(4b.2) Implement ERP software modules for purchasing and fixed assets. (Goals E, H) (AS Priority 2, 3, 4, 5)	X		IT staff, SIG, SungardHE, and Evisions consultant support as well as training facilities for training of Purchasing staff & on-line requisition users.
(4b.3) Establish and perform campus-wide training in on-line, and provide permanent "help" desk to assist campus users. (Goals D, E, H) (AS Priority 2, 3, 4, 5)	X		Coordination with IT staff and see listed "resources needed" for Items 4b.1 and 4b.2 above.
(4b.4) Establish and manage procurement card program to enhance institutional effectiveness. (Goals E, H) (AS Priority 3, 4, 5)	X		Additional permanent staff and training facilities needed to train users and manage the program (see 4b.1 and 4b.2 above); Fiscal Services and Purchasing Director should see decrease in processing reimbursement requests to partially mitigate against increase in audit functions.

Department/Unit Goal	Resources Needed?		If yes, please list resources needed
	Yes	No	
(4b.5) Provide and maintain current information about Purchasing and its processes to the campus and community. (Goals E, H) (AS Priority 3, 4, 5)	X		Continued POD facilities resources for ongoing training; coordination with IT and Marketing & Communication staff to expand websites and maintain data; additional Purchasing staff needed (see 4b.1 above).
(4b.6) Establish a campus-wide copier program. (Goals B, C, E, F, H) (AS Priority 1, 3, 4, 5)	X		Funding for Pro Buyers consultant fees for Phases 2 and 3 - \$22,500; Cabinet-level support to consolidate and centralize copiers into single program administered by IT/Purchasing; Possible Budget Managers support to reallocate program funding so costs and savings are centralized.

7. Signatures

Department Chair or Unit Manager: _____ Date: _____

Dean/Supervisor: _____ Date: _____