Chaffey College Program Review
Three Year Review 2011

PROGRAM OVERVIEW

Program Title: Purchasing Services

Program Code: 6777 - PURCHASING

Review Type: Administrative

Does this review contain any career technical education (occupational) programs?
No

External Regulations:
No

Chaffey College Mission Statement

Chaffey College improves lives within the diverse communities it serves through equal access to quality occupational, transfer, general education, and foundation programs in a learning-centered environment where student success is highly valued, supported, and assessed.

Please describe how your program supports the college's mission and discuss how your program evaluates its effectiveness in meeting the college mission:

The primary responsibility of the department is to provide value-added purchasing services to our customers every day so that the students, faculty, and staff we serve have the necessary resources and tools they need to be successful. This is accomplished by providing educational resources, supplies, materials, and services to be available at the correct time, in the proper quantity, delivered to the required location, with quality and cost consistent with the needs of the District. Purchasing Services can be divided into the following business units, with core functions briefly summarized below. Purchasing, Contracts, and Public Works Operations: Value is maximized by ensuring goods and services, to include public works projects, are obtained at fair and reasonable prices, or best value, to ensure tax payer dollars and public funds are expended wisely. In carrying out its fiduciary responsibilities as a steward of public funds, the department serves as the District’s primary resource for the interpretation and application of California procurement statutes, codes, regulations, and purchasing policies and procedures to ensure the District is compliant with all applicable laws in order to minimize legal liability. Warehouse, Receiving, Stores, Inventory, Disposal, Delivery, and Mail Operations: The warehouse is a key component of the District’s
It serves as the “hub” for incoming deliveries received in response to District purchase orders, in addition to packaging and shipping returns of damaged or non-conforming supplies, materials, or equipment. District assets and inventory are managed with control requirements, to include storage and their proper disposal. Additionally, the warehouse is responsible for all incoming and outgoing District business-related U.S. mail, express mail, and inter-office mail to the designated recipients. Facilities Scheduling and Rental Operations: In accordance with Education Code, the District grants the public use of its facilities and grounds to the community. The scheduling of facilities supports the District’s mission by assisting faculty, staff, and student club advisors to schedule meetings and events on campuses, while facility rentals provide revenue to the District and strengthens community partnerships and relations. Facility Scheduling coordinates these activities with the day-to-day instructional activities of the District in order to avoid scheduling conflicts and also ensures contracts are compliant with applicable laws and District policy in order to minimize any potential liability. Purchasing Services evaluates its effectiveness in meeting the District’s mission through the District’s annual audit. In regards to Purchasing Services, there have been no audit findings specific to the department within the last six years. The District was found to be non-compliant during the 2010-2011 fiscal year audit as it pertained to grant administration, specifically, in regards to certain procurements requested by departments. Purchasing Services worked with the District’s internal auditor and created procedures for grant administrators to follow to ensure departments are compliant with Federal procurement guidelines. As a service department, providing and maintaining customer service is very important to Purchasing Services. In an effort to measure the department’s effectiveness in meeting this objective the department, in collaboration with Institutional Research, constructed and administered an online survey to faculty and staff to measure satisfaction with the services and resources provided. Although the results are still under evaluation, responses indicate relative satisfaction with the services provided by the department. Additionally, Purchasing Services is measured by its excellence of documents and work product. The department is also working on the implementation of other forms of benchmarking and measurements for the department, as noted under the “Visionary Improvement Plan” page of this PSR.

Review Team Response
The review team commends the Purchasing Department for a well written PSR that details the department’s operations. The review team commends the department for collaborating with Institutional Research in constructing an on-line survey for faculty and staff to measure satisfaction and effectiveness.

PROGRAM DATA
Enrollment
<table>
<thead>
<tr>
<th>Measure</th>
<th>2008-09 to 2009-10</th>
<th>2009-10 to 2010-11</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Census Enrollment</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Day</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Evening</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Online</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Arranged</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>
Given the data, what changes can be identified in enrollment patterns? Identify any important trends and explain them.

Retention
Retention Rate by Day, Evening, Online, Arranged ()

<table>
<thead>
<tr>
<th>Measure</th>
<th>2008-09 to 2009-10</th>
<th>2009-10 to 2010-11</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Census Retention</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Day</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Evening</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Online</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Arranged</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>
Given the data, what changes can be identified in retention patterns? Identify any important trends and explain them.

Success
Success Rate by Day, Evening, Online, Arranged

<table>
<thead>
<tr>
<th>Measure</th>
<th>2008-09 to 2009-10</th>
<th>2009-10 to 2010-11</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Census Success</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Day</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Evening</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Online</td>
<td>N/A</td>
<td>N/A</td>
</tr>
<tr>
<td>Arranged</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>
Given the data, what changes can be identified in student success patterns? Identify any important trends and explain them.

Review Team Response

DEGREE/CERTIFICATE DATA

Review Team Response

STUDENT LEARNING OUTCOMES

Discuss how the number, type, depth, and breadth of the courses support program SLO's.

Discuss how courses in the program articulate with or complement each other.

Discuss how courses in the program interact with other programs on campus (for example: cross-listing, overlapping content, or shared resources).

How and when has your department assessed Program SLO's and how have you responded to the
What program or course changes have been made based on the result of the assessed outcome?

Review Team Response

Discuss how your services help maintain a high level of student satisfaction.

Discuss how you evaluate your effectiveness in meeting students' needs.

How and when has your service reviewed or revised SLOs and/or AUOs?

How has your program utilized SLO/AUO assessment results for program improvement?

Review Team Response

**CURRICULUM UPDATE**

<table>
<thead>
<tr>
<th>Courses</th>
<th>Last Modified</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Programs</th>
<th>Last Modified</th>
</tr>
</thead>
</table>

Courses should be updated every six years; if course updates are due, please describe your plan and timeline for updating courses:

What steps has your program taken to proactively respond to changing and emerging student and community needs?

Briefly explain:

Review Team Response

Review Team Response

**NON-INSTRUCTIONAL PROGRAM INFORMATION**

How does your program improve, expand, or support student learning? How do you know?

Purchasing Services maintains high standards of performance based upon fair, ethical, and professional business practices. The department’s activities support the operations of the District by providing faculty and staff with educational resources of the highest value procured through competitively priced purchases, efficient logistics, and use of the District’s facilities. These services are also provided in compliance with District policy and applicable laws and regulations in order to minimize any potential legal liability or risk. Purchasing Services strives to continually improve and expand the services it provides to advance the mission of the District by establishing yearly goals and objectives. Strengths and weaknesses of the department are identified and outlined. Goals and objectives must be SMART (i.e., specific, measurable, action-oriented, realistic, time-bound/trackable) and relate directly to outcomes.
specific to the District’s mission. The Purchasing Services Manager meets with the Vice President of Business Operations to ensure departmental goals either improves, expands, or supports the operations of the District. Once established, the department’s SMART goals are then further classified into the following areas: (1) Customer Service, (2) Knowledge Transfer & Professional Development, (3) Business Processes, (4) Financial, and (5) Other Accomplishments and Personal Achievements. Measurements must either quantify or qualify results. Key accomplishments for the year are then documented into a report and distributed to executive management. An example of the aforementioned report, entitled “Key Accomplishments for FY 2010-2011”, is attached under the “Attached Files” page of this PSR.

Describe staff functions and services (these can include diversity, specialties, staff preparation and training, professional activities and committee participation, accomplishments, grants, new programs etc.)

How does your program evaluate its effectiveness?

The Purchasing Services department has been effective in providing procurement, logistics, mail delivery, and facilities scheduling services to the District’s three campuses and off-site centers on a daily basis. The organizational structure of Purchasing Services includes the following: One (1) Director of Purchasing Services (currently vacant), one (1) Purchasing Services Manager, three (3) Buyers, one (1) Assistant Buyer, one (1) Administrative Assistant II (to support purchasing, contracts, and public works operations), one, (1) Administrative Assistant II (to support facilities scheduling and rentals), one (1) Warehouse Specialist, one (1) Purchasing Warehouse Assistant, and one (1) Delivery Driver. An organizational chart of Purchasing Services is attached under the “Attached Files” page of this PSR. Core functions and services for the above-referenced staff are briefly summarized below. Director of Purchasing Services: Currently vacant Purchasing Services Manager: The Purchasing Services Manager manages and supervises the daily activities and operations for purchasing, contracting, warehousing, receiving, mail, fixed assets, and facilities scheduling for the department. Additionally, this position requires expertise in order to serve as the primary resource for the interpretation and application of applicable laws in order to minimize any potential legal liability or risk. The incumbent in this role must also ensure that the operations of the department directly relate to the needs of the District while selecting and implementing the appropriate strategies to support the vision and goals of the District. Administrative Assistant II – Purchasing, Contracts, and Public Works: At the direction of the Purchasing Services Manager, this position coordinates the day-to-day operations of the department, to include serving as liaison between supervisor, staff, students, and community groups, preparation of board reports, and the administration of public works contracts. This position requires the incumbent to maintain updated knowledge and records of regulations and requirements applicable to procurement and bond measures, and provide procurement procedures and regulations to college staff, contractors, and the general public. This position also assists in the training and scheduling of duties for student and short term hourly workers. Administrative Assistant II – Facilities Scheduling and Rentals: The Facilities Scheduling and Rental Operations business unit is staffed with one person who is responsible for all of the scheduling of the District’s facilities and grounds pursuant to the California Civic Center Act and District policies and procedures. These activities require preparation of contracts for facility rentals, facilities usage and release of liability waivers, and verification of required insurance coverages. This position also assists in purchasing-related matters, such as responding to public records act requests, inventory and fixed asset management, board reports, and the preparation of annual District-wide requisitions. Buyers and Assistant Buyer: Responsibilities in these roles include the procurement, negotiation, and administration of purchase orders (POs) and contracts for goods and
services for all schools and departments within the District. Additional responsibilities include developing and administering request for quotes (RFQs) and bids, strategic sourcing, and monitoring of POs and contracts to ensure suppliers are in compliance with the terms and conditions of the PO/contract. The Buyers and Assistant Buyer are assigned as a primary point of contact (POC) for the various schools/departments within the District. A POC chart is attached under the “Attached Files” page of this PSR showing assigned areas of responsibility. Additionally, the individuals in these positions are each assigned various specific commodities (outside of assigned schools/departments) to serve as a specialist in the procurement of certain goods and services. Warehouse Specialist and Purchasing Warehouse Assistant: These positions are responsible for the receipt of goods from suppliers in response to POs issued, which includes verifying that shipping orders and/or bill of ladings reconcile with POs, inspection of products, and refusal or return of damaged goods, as appropriate. Additional responsibilities also include proper disposal of the District’s inventory and assets at the end of the products useful life, surplus sale and donation of District property, records retention, and various move logistics. Delivery Driver: The Delivery Driver is responsible for the delivery of all first class, parcel, and expedited mail to all three campuses and off-site centers within the District. This role also serves in the fulfillment of delivery of inventory requested from the District’s stores account. Purchasing Services evaluates its effectiveness in relation to day-to-day activities by monitoring successful progress of outstanding requisitions, requests for contracts, and change orders; processing of product received by the warehouse to the end recipient; and timely completion of facilities scheduling and rental requests.

**Review Team Response**

The department indirectly addresses support of students by providing faculty with educational resources. Purchasing clearly outlines the functions of the staff and its services. Department has administered an on-line faculty and staff survey as a measure to evaluate effectiveness. These results should be shared, when complete, with faculty, staff and administration. The department is in the process of expanding the database for vendors. The review team recommends that this department develop a policy and/or procedure to advise faculty and staff in advance, about the district policies and the steps (time tables) needed to complete funding requests (deriving from grants, such as Perkins, and other funding sources) for bids and other local and state financial regulations.

**STUDENT SUPPORT - ACCESS**

How do the services you provide to students facilitate access to learning? (e.g. - admissions applications, payment processing, pre-requisite clearances, assessment testing, adaptive technology, program applications, healthcare, student activities, and other specialized services.)

<table>
<thead>
<tr>
<th>Type of Service</th>
<th>Description of Service</th>
<th>How many students received this service?</th>
<th>Measured with?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>08-09</td>
<td>09-10</td>
</tr>
</tbody>
</table>

Additional information:

**Review Team Response**

**STUDENT SUPPORT - SUPPORT**
How do the services you provide to students support student learning? (e.g. 'counseling, orientations, workshops, financial assistance (scholarships, grants, etc'), career assessments, health education, service learning, advisory committees, and other specialized services.)

<table>
<thead>
<tr>
<th>Type of Service</th>
<th>What knowledge, skills, and/or abilities are learned?</th>
<th>How many students received this service?</th>
<th>Measured with?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>08-09</td>
<td>09-10</td>
</tr>
</tbody>
</table>

Additional information:

Review Team Response

STUDENT SUPPORT - OTHER

How do the services you provide to students promote transfer, completion, specialized services, and/or future success? (e.g. graduation ceremony, CSU/IGETC certifications, university transfer, securing employment, transcript requests, enrollment verification, conferring of degrees/certificates, scanning/imaging documents, phone calls received, face-to-face contacts, refunds granted, and other specialized services.)

<table>
<thead>
<tr>
<th>Type of Service</th>
<th>How does this contribute to student success?</th>
<th>How many students received this service?</th>
<th>Measured with?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>08-09</td>
<td>09-10</td>
</tr>
</tbody>
</table>

Additional information:

Review Team Response

VISIONARY IMPROVEMENT PLAN(VIP)

Please identify 1-3 program improvement goals for the next three years. Goals should state 'what' you plan to achieve and the rationale 'why' for doing so. 'How' you achieve your goals will be entered under Steps to Success. Keep in mind that your VIP should be SMART:

- Specific
- Measurable
- Action-oriented
- Realistic
- Time-bound

All plans should improve or expand student learning.
Year Three Goal:
To which planning direction does this goal apply?
Year 1 Steps to Success (activities) and VIP Assessment:
Year 2 Steps to Success (activities) and VIP Assessment:

Year Three Goal:
To which planning direction does this goal apply?
Year 1 Steps to Success (activities) and VIP Assessment:
Year 2 Steps to Success (activities) and VIP Assessment:

Year Three Goal:
Goal 1 – Performance Measurement: Establish a benchmark or performance measurement the Purchasing Services department can use in order to better assess workload and work performance to ensure the mission of the District is accomplished in the most efficient and effective means possible. Goal 2 – P-Card: Establish a procurement card (P-Card) program for the District for the purchase of low-dollar, low-risk items in order to reduce costs and increase purchasing efficiencies by (1) reducing cycle time of low-dollar value purchasing transactions that contain minimal risk, (2) reducing the number of supplier invoices received, and (3) foster a feeling of empowerment among faculty and staff within the schools and departments the Purchasing Services department serves.

To which planning direction does this goal apply?

Year 1 Steps to Success (activities) and VIP Assessment:
Goal 1 – Performance Measurement: Research benchmarks and performance measurements that may be used within a public purchasing department, specifically, a school district. Resources for data may include performance measurements referenced and/or recommended by public procurement associations (e.g., National Institution of Governmental Purchasing, California Association of Public Procurement Officials, National Contract Management Association, etc.), networking with colleagues and other agencies, and Internet research. Goal 2 – P-Card: Research P-Cards available to public entities and that are in compliance with California statutes, codes, and regulations (e.g., Cal-Card, American Express, Educational & Cooperative (E&I) Cooperative Purchasing, etc.). Research P-Card programs used at other entities, specifically school districts, to identify successes and lessons-learned. Other entities may already have well defined policies and procedures that the District can use as a model.

Year 2 Steps to Success (activities) and VIP Assessment:
Goal 1 – Performance Measurement: Currently there is no generally accepted standard for procurement performance measurement in the public sector. At the end of Year 1 the department will have identified benchmarks and measurements available in order to determine which one(s) best suit the needs of the District. Goal 2 – P-Card: At the end of Year 1 a list of P-Cards in compliance with applicable laws will have been identified. A compilation of P-Card programs will be gathered from other public entities, specifically, programs from other school districts. Additionally, the department will note any success stories and lessons-learned from other agencies.
Goal 1 – Performance Measurement: Test the benchmarks and measurements identified from the research conducted and determine which one(s) will provide the best data than can be used to measure efficiencies and effectiveness within the Purchasing Services department. Goal 2 – P-Card: Determine P-Cards available that offer the best terms and conditions relative to the District’s annual spend volume and meet with Budget and Accounting to discuss potential implementation of a P-Card program. Draft P-Card program policies and procedures for the District.

Goal 1 – Performance Measurement: Testing will reveal which benchmark(s) and/or performance measurement(s) can be used as a performance measurement tool to assess efficiencies and effectiveness within the department. Goal 2 – P-Card: A short list of two or three P-Card(s) with the best terms and conditions relative to the District’s annual spend volume will have been identified. Purchasing will meet with Budget and Accounting and determine which P-Cards on the short list are possible candidates for implementation. By the end of Year 2, policies and procedures for the implementation of a P-Card program will be drafted and ready for initial review.

Review Team Response
The goals are clear, concise, attainable, measurable, and are clearly tied to data and SLO assessment results. They follow the handbook instructions: First, describe your goal with a verb. Next, include what you plan to achieve (what) and the rationale (why) in one sentence.

Very well written and detailed V.I.P. report!

PROFESSIONAL DEVELOPMENT ACTIVITIES THAT SUPPORT STUDENT LEARNING OR IMPROVE YOUR PROGRAM

List Recent departmental professional development activities connected to student learning.

<table>
<thead>
<tr>
<th>Recent activities</th>
<th>Recent workshops/courses taken</th>
<th>Recent conferences/training</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>See Attachment PSR-Professional Development Document</td>
<td>See Attachment Professional Development Document</td>
<td>See Attachment Professional Development Document</td>
<td></td>
</tr>
</tbody>
</table>

How are student learning outcomes affected by these professional activities? What steps are recommended for improvement?
N/A

Discuss departmental engagement on campus in connection to student learning.

<table>
<thead>
<tr>
<th>Governance committees</th>
<th>Other college-related committees</th>
<th>Other campus participation</th>
</tr>
</thead>
<tbody>
<tr>
<td>See Attachment Professional Development Document</td>
<td>See Attachment Professional Development Document</td>
<td>See Attachment Professional Development Document</td>
</tr>
</tbody>
</table>

How does your program benefit from your campus engagement?
Purchasing Services benefits from having staff participation in Classified Senate activities and by attending various workshops and conferences. The information and knowledge attained from these activities are transferred and shared with colleagues to assist them in becoming informed in changing events and share in best practices. Staff within the department only attend workshops that
directly relate to their job functions and responsibilities, and that can be put to practice for the betterment of the District.

**Teaching/Years of Service**

<table>
<thead>
<tr>
<th>0-5 years</th>
<th>6-10 years</th>
<th>11-15 years</th>
<th>16-20 years</th>
<th>21+ years</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Given the data how has your program been impacted?
N/A

**Does your program anticipate retirements within the next 3 years?**
Yes. One (1) Buyer within the department will be retiring on March 31, 2012: Isela Armijo, Buyer

**Review Team Response**
The department actively engages in professional development that benefits the district.

**PROJECTED NEEDS**

Is any part of the program funded by sources other than the instructional budget (such as grants, partnerships, or other means)? If yes, please identify the source, amount, and length of funding.
No. The Purchasing Services department is strictly funded by the instructional budget.

After reviewing and analyzing the data and assessment results in this report, please describe and provide rationale for any projected resource needs required to accomplish your Visionary Improvement Plan using the boxes below. Your requests should be based on student need.

**FT Faculty:**

**Year 1:**
N/A Goal 2 – P-Card: N/A

**Hiring Criteria:**

**Year 2:**
N/A

**Hiring Criteria:**

**Year 3:**
N/A

**Hiring Criteria:**

**STAFF**
Year 1
Goal 1 – Performance Measurement: N/A Goal 2 – P-Card: N/A

Year 2
Goal 1 – Performance Measurement: N/A Goal 2 – P-Card: N/A

Year 3
Goal 1 – Performance Measurement: N/A Goal 2 – P-Card: Additional Staff may be required in the form of a P-Card Administrator. This will be dependent on how robust the P-Card program will be and what policies and procedures are recommended to be implemented in order to adequately administer and control P-Card usage, to include training, administration, audits, and control points.

EQUIPMENT

Year 1
Goal 1 – Performance Measurement: N/A Goal 2 – P-Card: N/A

Year 2
Goal 1 – Performance Measurement: N/A Goal 2 – P-Card: N/A

Year 3
Goal 1 – Performance Measurement: N/A Goal 2 – P-Card: N/A

TECHNOLOGY

Year 1
Goal 1 – Performance Measurement: N/A Goal 2 – P-Card: N/A

Year 2
Goal 1 – Performance Measurement: N/A Goal 2 – P-Card: N/A

Year 3
Goal 1 – Performance Measurement: N/A Goal 2 – P-Card: N/A

SOFTWARE

Year 1
Goal 1 – Performance Measurement: N/A Goal 2 – P-Card: N/A

Year 2
Goal 1 – Performance Measurement: N/A Goal 2 – P-Card: Additional software may be required in order to implement an effective P-Card program. For example, a third-party software program may need to be licensed in order to download P-Card usage data into Datatel. If needed, this cost may be ongoing. Cost is unknown at this time.

Year 3
Goal 1 – Performance Measurement: N/A Goal 2 – P-Card: Same as noted above in Year 2.

OTHER

Year 1
Goal 1 – Performance Measurement: N/A Goal 2 – P-Card: N/A

Year 2
Goal 1 – Performance Measurement: N/A Goal 2 – P-Card: N/A

Year 3
Goal 1 – Performance Measurement: N/A Goal 2 – P-Card: N/A

Review Team Response
Projected needs are clearly tied to the Visionary Improvement Plan.

Review Team Response
The program contains excellent information and analysis to be useful for planning, supporting and improving student achievement and SLO’s. The review contains clear, measurable goals and resource requests. A well written document that supports the district's mission. The department was responsive to the review team. The information on the z-drive is organized and pertinent. Recommendation is that perhaps the data on the z drive be accessible to all faculty who use either Mac or PC computers.