



**Support Services
Administrative Review
2001-2002**

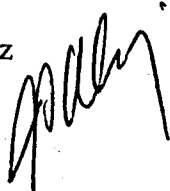
Purchasing/Property Accounting

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MEMORANDUM

Date: August 27, 2002
To: Dr. Gustavo Valadez
From: J. L. Alaniz
Subject: PROGRAM REVIEW SUMMARY



The departments of Purchasing/Property Accounting and Information Technology have completed their administrative reviews as part of the College's planning cycle. I have reviewed each of the reports and would like to affirm the process undertaken in this worthwhile endeavor. The reviews provided the departments the opportunity to look at themselves and make the necessary changes to better serve this institution. Each unit provided a comprehensive overview of its operation and identified strengths, weaknesses, and recommendations which will allow them to maintain a functional perspective of their impact as service units and how their contribution readily affects the College's mission.

Within the last five years, each of these service units has restructured and undergone operational changes in order to better serve the College. Each unit continues to look at its effectiveness and will seek to provide responsiveness and improve the quality of service of their respective units.

mhj/

Support Services Administrative Review 2001/2002

Purchasing/Property Accounting

I. Mission of Support Service Unit

1. The mission of the Purchasing/Property Accounting Department is to support all functions of the College in the purchasing, distribution and record keeping of needed goods and services in the most efficient manner to achieve the best products and services at the best price for the purpose intended.
2. The College affirms that excellence in instruction at *reasonable cost* is its highest priority and that it will fulfill its mission within the limitations of its physical and financial resources. The mission of the Purchasing/Property Accounting Department supports the College mission by effectively employing the departmental mission and employing sound and efficient purchasing policies.

II. Service Unit Goals

1. To provide outstanding service by our buying staff to College departments both educational and operational to acquire goods and services needed to achieve their specific mission within the College and the community and to assure that all commodities and services meet the needs of the campus as required.

Expected Result: Transfer 90% of all requisitions within two days of receipt. The other 10% will constitute those in need of quotations or bid information. Those in need of quotations should be completed within 10 days and those requiring some form of sealed bid process should be completed in no more than 45 days.

2. To provide outstanding service to the College community with a Central Stores or equivalent program for acquisition of MRO and office supplies.

Expected Result: To have 90% of all desk-top delivery request filled within two days. The remaining 10% should account for special orders which should be filled within 30 days.

3. To provide outstanding service to the College community by our Property Accounting Department, keeping accurate records as they relate to the purchase and history of capital assets. This includes providing accurate information to insurance companies and state offices as required.

Expected Results: To have 80% of all inventory listings reflect proper locations, descriptions and values. The other 20% would account for assets moved and not reported to the Property Accounting Department.

4. To provide outstanding service to the College community by the Electronic Technicians of the Purchasing Department to keep all electronic equipment in a state of readiness and repair for the most efficient use of said equipment to achieve the goals of the College departments whether instructional or operational.

Expected Results: To have 90% of all electronic repair requests completed and returned to the department within 30 days of receipt of request.

5. To provide outstanding service to the College community by Warehouse/Delivery personnel of the Purchasing Department to assure timely redelivery of supplies to departments as well as the movement of equipment throughout the campuses as required by all departments.

Expected Results: To deliver 100% of all desk top deliveries within 24 hours of their delivery to the Purchasing warehouse from the vendor. To make all other deliveries within two days of receipt or when certified for delivery. To make all pickups and deliveries as requested by ETR on the date and time requested. To complete all surplus merchandise pickups within seven days of the received request.

6. To realign the staff and duties in Property Accounting, Central Stores and Warehouse operations to best achieve the above listed goals.

Expected Results: This project should be completed by the end of the fiscal year 2001/2002.

7. To initiate the implementation of software systems in the areas of bids, commodities, and fixed assets.

Expected Results: The Property Accounting Department should begin the implementation of the Fixed Asset module by June 1, 2002 and should be approximately 50% in place. The new system should be operating side by side with the current system by the end of the fiscal year. The Bids and Commodities modules should begin implementation after the completion of the Fixed Asset module.

III. Evaluation

1. Past practices for evaluation which will be carried forward include the use of surveys and immediate feedback from user departments as well as administrators.
2. An assessment survey of the Purchasing Department, which was conducted in September 2000 indicated that the Department was very successful in achieving the goals of providing outstanding service to the College. Feedback from users and administrators has been used to evaluate newly implemented programs such

as rental of travel vehicles, the desk-top delivery service, and the increased level of accounting for capital assets with its results on taking of the annual inventories.

3. The department has continued to concern itself with its service levels as well as its appearance and perception of caring to the using departments. The survey indicates the department is achieving its goals with an average score on the 27 question survey of 5.73 with to lowest being one and the highest being seven.

Service Unit Functions

1. The principal functions performed by this department are:
 - A. Purchasing of goods and services for the College
 - B. Accounting for all items classified as capital assets
 - C. Performing repairs and checks of electronic equipment
 - D. Providing Desk Top delivery to the College
 - E. Providing Receiving, Shipping, Delivery, and Warehousing requirements to the College.
 - F. Providing travel vehicles to meet the needs of the College
 - G. Providing mail delivery to the campuses.
 - H. Finding new ways to assist all facets of the College thereby allowing the College to use more of its assets and time of its personnel to further the basic mission of education to the public.
2. In 1994/95, the department processed \$3.3 million in Purchase Orders. In 97/98, the department processed \$25.7 million in Purchase Orders. Our goal is to do more with less. This requires the department to create more expedient methods of purchasing, record keeping and movement of goods. The department is constantly analyzing its methods, procedures, and requirements.

Service Unit Clientele

1. The principal clientele served are employees who serve the Educational and Operational needs of the College. This in evidently serves the student, who is why we exist.
2. The services provided are as many as the users need.

Personnel

1. The personnel in the Purchasing Department as follows:
APT Personnel:
 - A. Director
 - B. Assistant Director
 - C. Purchasing Agent
 - D. Buyers (2)

E. Property Control Manager

Office Personnel:

- A. Buyers' Assistant
- B. Departmental Secretary

Support Personnel:

- A. Electronic Technicians (2)
- B. Warehouse Supervisor
- C. Receiver
- D. Delivery Driver/Warehouseman (6)

2. The staff is adequate for current services. There will be some reorganization in the warehouse activities in this fiscal period.
3. The current possesses all specialized skills required to support the service area. The department is constantly searching for new and improved training methods to improve its service levels.

Professional Activities

1. The staff in this department belongs to the following professional organizations:
 - A. National Association of Supply Management (formerly National Association of Purchasing Managers) and a local chapter.
 - B. National Association of Educational Buyers (NAEB) and (TOAL).
 - C. National Institute of Governmental Purchasing (NIGP)
 - D. Community College Business Officers Association (CCBO)
 - E. Texas Association of Community College Business Officers (TACCBO)
 - F. National Purchasing Institute (NPI)

Professional Development

1. The department has personnel who have achieved a CPPO, A.P.P, and C.T.P. certifications. Staff members have attended the National Conference for NAEB; the National Association of College Auxiliary Services (NACAS) National Conference; National Association of Travel Management National Conference; the National Association of Purchasing Management Timeline 2002 Conference, as well as local satellite conferences.
2. The department will need training on GASB 34 & 35 as well as the Fixed Asset System which is about to be implemented.

Facilities and Equipment

1. The facilities will need some renovation due to the realignment and hiring of new personnel.
2. The current space is adequate.
3. The current equipment is adequate. Change of trucks will be required in the future.
4. No other facilities or equipment is needed at this time unless other duties or requirements are added to the department's responsibilities.

Budget and Expenditures

1. The service area does not generate revenue. The service area budgets have been adequate to meet the departmental needs.

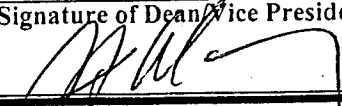
Accreditation

1. Not applicable

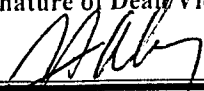
Service Unit Evaluation Summary and Recommendations

1. *Service Area Strengths:*
Knowledge of personnel; desire of personnel to give a high level of service; loyalty of personnel to the department; desire of personnel to find new and better ways to achieve goals.
2. *Service Area Weaknesses:*
Newness of personnel to the College; current unfilled positions.
3. *Recommendations:*
 - A. Increased communications by way of departmental meetings.
 - B. Increased training of all aspects of the department.
 - C. Mechanize certain paper functions of the department to decrease time involvement by staff.
 - D. Improve the reporting system of the Electronic Technicians' area to be more aware of the timeline on repair and maintenance projects.

Del Mar College
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2001-2002

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9. Strategies (Activities Planned): A. Setup a system for Vendor and Contractor evaluation. This is important since many contracts are now being let on the basis of Request for Proposals and Request for Competitive Sealed Proposals. B. Implement a more complete contract program. This is to include Dollar Value of the job, Type of Funding, Approval Method – Board or Administration, Type of Contract to be used, and Bonding required.									
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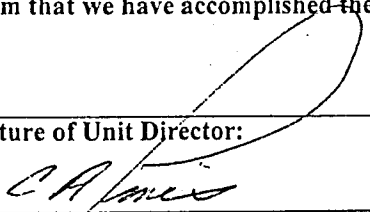
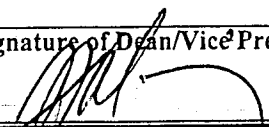
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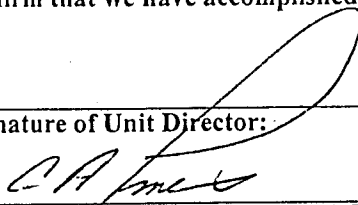
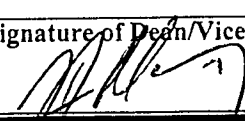
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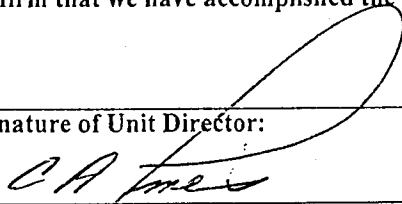

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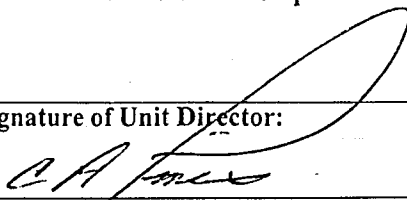
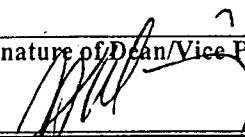
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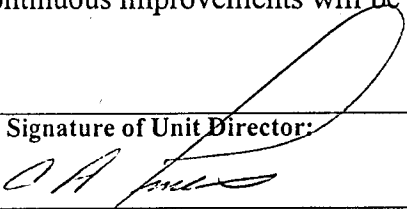
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8. Assessment Question and Expected Results: Improvement of Purchasing Office ability to deal with contracts as well as improve the efficiency of the department in its daily activities.													
9. Strategies (Activities Planned): F. Find and attend instructional sessions dealing with Contract Management. This is a subject of great importance to all Community College Purchasing Directors. G. Begin working on a Purchasing Card System for the College.													
10. Assessment Procedures (how will you measure for results and who is responsible for conduct of this assessment): A. Internal Assessment Review B. Campus User Assessment Survey C. Vendor Assessment Survey													
11. Budget Cost Impact, if any (does not assure budget approval): <table style="width: 100%; border: none;"> <tr> <td style="padding-left: 20px;">Personnel</td> <td style="padding-left: 10px;">\$</td> <td style="border-bottom: 1px solid black; width: 100px;"></td> </tr> <tr> <td>Equipment</td> <td></td> <td style="border-bottom: 1px solid black;"></td> </tr> <tr> <td>Other</td> <td></td> <td style="border-bottom: 1px solid black; text-align: right;">500.00</td> </tr> <tr> <td>Total</td> <td>\$</td> <td style="border-bottom: 1px solid black; text-align: right;">500.00</td> </tr> </table>		Personnel	\$		Equipment			Other		500.00	Total	\$	500.00
Personnel	\$												
Equipment													
Other		500.00											
Total	\$	500.00											
12. Use of Assessment Findings (how will you use the findings): To confirm that we have accomplished the goal and that it has been beneficial to all areas.													
13. Signature of Unit Director: 	Date: 8/1/00												
14. Signature of Dean/Vice President: 	Date												

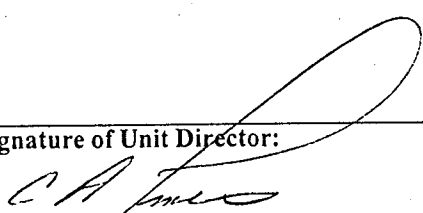
**Del Mar College
Institutional Effectiveness Unit Plans
2000-2001**

1. Unit: Purchasing Department	2. Division: Business								
3. College Mission Addressed: The College affirms that excellence in instruction at reasonable student cost is its highest priority and that it will fulfill its mission within the limitation of its physical and financial resources.									
4. Unit Purpose: To support all functions of the College in the purchasing of needed goods and services in the most efficient manner to achieve the best products and services at the best price for the purpose intended.									
5. Link to Strategic Plan: Goal # D Objective # D.2	6. Proposed completion date: 8/31/01								
7. Link to Unit Goal # 1 OR Student Learning Objective #									
8. Assessment Question and Expected Results: Improvement of Purchasing Office ability to deal with contracts as well as improve the efficiency of the department in its daily activities.									
9. Strategies (Activities Planned): H. Setup a system for Vendor and Contractor evaluation. This is important since many contracts are now being let on the basis of Request for Proposals and Request for Competitive Sealed Proposals. I. Implement a more complete contract program. This is to include Dollar Value of the job, Type of Funding, Approval Method – Board or Administration, Type of Contract to be used, and Bonding required.									
10. Assessment Procedures (how will you measure for results and who is responsible for conduct of this assessment): A. Internal Assessment Review B. Campus User Assessment Survey C. Vendor Assessment Survey									
11. Budget Cost Impact, if any (does not assure budget approval): <table style="width: 100%; border: none;"> <tr> <td style="padding-left: 20px;">Personnel</td> <td style="padding-left: 10px;">\$ _____</td> </tr> <tr> <td>Equipment</td> <td>_____</td> </tr> <tr> <td>Other</td> <td>500.00</td> </tr> <tr> <td>Total</td> <td>\$ 500.00</td> </tr> </table>		Personnel	\$ _____	Equipment	_____	Other	500.00	Total	\$ 500.00
Personnel	\$ _____								
Equipment	_____								
Other	500.00								
Total	\$ 500.00								
12. Use of Assessment Findings (how will you use the findings): To confirm that we have accomplished the goal and that it has been beneficial to all areas.									
13. Signature of Unit Director: 	Date: 8/1/00								
14. Signature of Dean/Vice President: 	Date:								

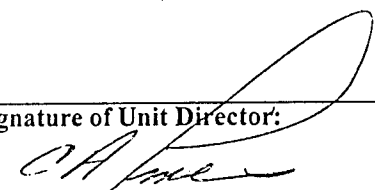
Del Mar College
Assessment of Institutional Effectiveness Unit Plans
2000-2001

1. Unit: Purchasing	2. Division: Business and Finance
3. College Mission Addressed: The College affirms that excellence in instruction at reasonable student cost is its highest priority and that it will fulfill its mission with the limitation of its physical and financial resources.	
4. Unit Purpose: To support all functions of the College in the purchasing of needed goods and services in the most efficient manner to achieve the best products and services at the best price for the purpose intended.	
5. Link to Strategic Plan: Goal # D Objective # 2 7. Link to Unit Goal # 1 OR Student Learning Objective #	6. Proposed completion date: August 31, 2001
8. Expected Results: Improvement of Purchasing Office ability to deal with contracts as well as improve the efficiency of the department in its daily activities.	
9. Strategies (Activities) Completed: A system for vendor and contract evaluation was setup.	
10. Assessment Procedures Used: An internal assessment was done to determine effectiveness.	
11. Status: <input type="checkbox"/> No progress <input type="checkbox"/> Limited progress <input type="checkbox"/> Limited progress due to budget restraints <input type="checkbox"/> In progress <input type="checkbox"/> On going <input type="checkbox"/> Near completion <input type="checkbox"/> Completed	12. Results of Assessment: Good
13. Use of Assessment Findings: Continuous improvements will be made.	
14. Signature of Unit Director: 	15. Signature of Dean/Vice President:
Date	Date

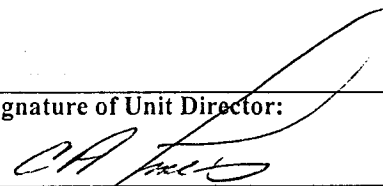
Del Mar College
Assessment of Institutional Effectiveness Unit Plans
2000-2001

3. Unit: Purchasing	4. Division: Business and Finance
3. College Mission Addressed: The College affirms that excellence in instruction at reasonable student cost is its highest priority and that it will fulfill its mission with the limitation of its physical and financial resources.	
4. Unit Purpose: To support all functions of the College in the purchasing of needed goods and services in the most efficient manner to achieve the best products and services at the best price for the purpose intended.	
5. Link to Strategic Plan: Goal # D Objective # 2 7. Link to Unit Goal # 1 OR Student Learning Objective #	6. Proposed completion date: August 31, 2001
8. Expected Results: Improvements of purchasing office ability to deal with contracts as well as improve the efficiency of the department in its daily activities.	
9. Strategies (Activities) Completed: Located and attended instructional sessions dealing with contract management.	
10. Assessment Procedures Used: Internal assessment.	
11. Status: <input type="checkbox"/> No progress <input type="checkbox"/> Limited progress <input type="checkbox"/> Limited progress due to budget restraints <input type="checkbox"/> In progress <input type="checkbox"/> On going <input type="checkbox"/> Near completion <input type="checkbox"/> Completed	12. Results of Assessment: Excellent
13. Use of Assessment Findings:	
14. Signature of Unit Director: 	15. Signature of Dean/Vice President:
Date	Date

Del Mar College
Assessment of Institutional Effectiveness Unit Plans
2000-2001

5. Unit: Purchasing	6. Division: Business and Finance
3. College Mission Addressed: The College affirms that excellence in instruction at reasonable student cost is its highest priority and that it will fulfill its mission with the limitation of its physical and financial resources.	
4. Unit Purpose: To support all functions of the College in the purchasing of needed goods and services in the most efficient manner to achieve the best products and services at the best price for the purpose intended.	
5. Link to Strategic Plan: Goal # D Objective # 2 7. Link to Unit Goal # 1 OR Student Learning Objective #	6. Proposed completion date: August 31, 2001
8. Expected Results: Improvement of purchasing office ability to deal with contracts as well as improve the efficiency of the department in its daily activities.	
9. Strategies (Activities) Completed: A website was developed.	
10. Assessment Procedures Used: Use of website by college personnel.	
11. Status: <input type="checkbox"/> No progress <input type="checkbox"/> Limited progress <input type="checkbox"/> Limited progress due to budget restraints <input type="checkbox"/> In progress <input type="checkbox"/> On going <input type="checkbox"/> Near completion <input type="checkbox"/> Completed	12. Results of Assessment: Excellent
13. Use of Assessment Findings:	
14. Signature of Unit Director: 	15. Signature of Dean/Vice President: _____
Date	Date

Del Mar College
Assessment of Institutional Effectiveness Unit Plans
2000-2001

7. Unit: Purchasing	8. Division: Business and Finance
3. College Mission Addressed: The College affirms that excellence in instruction at reasonable student cost is its highest priority and that it will fulfill its mission with the limitation of its physical and financial resources.	
4. Unit Purpose: To support all functions of the College in the purchasing of needed goods and services in the most efficient manner to achieve the best products and services at the best price for the purpose intended.	
5. Link to Strategic Plan: Goal # D Objective # 2 7. Link to Unit Goal # 1 OR Student Learning Objective #	6. Proposed completion date: August 31, 2001
8. Expected Results: Improvement of purchasing systems in order to reduce purchasing costs and inventory holding costs.	
9. Strategies (Activities) Completed: Completed the development of a desktop delivery system for office supplies. Completed the development of a facilities store operation with next day delivery to eliminate the inventory dollars currently duplicated on campus.	
10. Assessment Procedures Used: Numbers of users of the desktop delivery system. Reduction in inventory dollars.	
11. Status: <input type="checkbox"/> No progress <input type="checkbox"/> Limited progress <input type="checkbox"/> Limited progress due to budget restraints <input type="checkbox"/> In progress <input type="checkbox"/> On going <input type="checkbox"/> Near completion <input type="checkbox"/> Completed	12. Results of Assessment: Excellent.
13. Use of Assessment Findings: Money usually dedicated to inventory was available in the general fund.	
14. Signature of Unit Director: 	Date
15. Signature of Dean/Vice President:	Date

Del Mar College
Institutional Effectiveness Unit Plans
1999-2000

1. Unit: Purchasing Department

2. Division: Business

3. College Mission Addressed:

The College affirms that excellence in instruction at reasonable student cost is its highest priority and that it will fulfill its mission within the limitation of its physical and financial resources.

4. Unit Purpose:

To support all functions of the College in the purchasing of needed goods and services in the most efficient manner to achieve the best products and services at the best price for the purpose intended.

5. Link to Strategic Plan: Goal # D Objective # D.2

6. Proposed completion date: 8/31/00

7. Expected Results:

Improvement of Purchasing Office ability to deal with contracts as well as improve the efficiency of the department in its daily activities.

8. Strategies (Activities Planned):

A. Find and attend instructional sessions dealing with Contract Management.

This is a subject of greater importance to all Purchasing Directors.

B. Get the Purchasing Department on NAEB Listserve. *Completed*

C. Obtain guidelines for Evaluation Committee members from Arizona State University in order to better safeguard the College during awards of bids. *Completed*

9. Assessment Procedures (how will you measure for results and who is responsible for conduct of this assessment):

A. Internal Assessment Review

B. Campus User Assessment Survey

C. Vendor Assessment Survey

10. Budget Cost Impact, if any (does not assure budget approval):

Personnel	\$ _____	Using Same Personnel
Equipment	_____	Using Same Equipment
Other	\$ 500.00	Cost of Supplies
Total	\$ 500.00	

11. Use of Assessment Findings (how will you use the findings):

To confirm that we have accomplished the goal and that it has been beneficial to all areas.

12. Signature of Unit Director:

C.A. Jones

Date

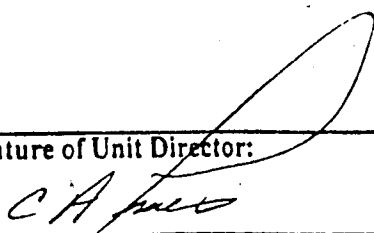

8/10/99

13. Signature of Dean/Vice President:

[Signature]

Date

Del Mar College
 Institutional Effectiveness Unit Plans
 1999-2000

1. Unit: Purchasing Department	2. Division: Business												
3. College Mission Addressed: The College affirms that excellence in instruction at reasonable student cost is its highest priority and that it will fulfill its mission within the limitation of its physical and financial resources.													
4. Unit Purpose: To support all functions of the College in the purchasing of needed goods and services in the most efficient manner to achieve the best products and services at the best price for the purpose intended.													
5. Link to Strategic Plan: Goal # D Objective # D.2	6. Proposed completion date: 8/31/00												
7. Expected Results: Improvement of Purchasing Systems in order to reduce Purchasing costs and the inventory holding costs.													
8. Strategies (Activities Planned): D. Within one year have a desktop delivery system for Office Supplies. (Handwritten: 1/2 way) E. Within one year setup a facilities stores operation with next day delivery to eliminate the inventory dollars currently duplicated on campus. 3/4 F. Within the next year, revise the purchasing policies and incorporate the purchasing authority of members of the Purchasing Department and how that authority comes about.													
9. Assessment Procedures (how will you measure for results and who is responsible for conduct of this assessment): A. Internal Assessment Review B. Campus User Assessment Survey C. Vendor Assessment Survey													
10. Budget Cost Impact, if any (does not assure budget approval): <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%;">Personnel</td> <td style="width: 15%;">\$ _____</td> <td style="width: 70%;">Using Same Personnel</td> </tr> <tr> <td>Equipment</td> <td>\$ _____</td> <td>Using Same Equipment</td> </tr> <tr> <td>Other</td> <td>\$ 500.00</td> <td>Cost of Supplies</td> </tr> <tr> <td>Total</td> <td>\$ 500.00</td> <td></td> </tr> </table>		Personnel	\$ _____	Using Same Personnel	Equipment	\$ _____	Using Same Equipment	Other	\$ 500.00	Cost of Supplies	Total	\$ 500.00	
Personnel	\$ _____	Using Same Personnel											
Equipment	\$ _____	Using Same Equipment											
Other	\$ 500.00	Cost of Supplies											
Total	\$ 500.00												
11. Use of Assessment Findings (how will you use the findings): To confirm that we have accomplished the goal and that it has been beneficial to all areas.													
12. Signature of Unit Director: 	13. Signature of Dean/Vice President: 												
Date 8/10/99	Date												

Del Mar College
Institutional Effectiveness Unit Plans
1999-2000

1. Unit: Purchasing Department

2. Division: Business

3. College Mission Addressed:

The College affirms that excellence in instruction at reasonable student cost is its highest priority and that it will fulfill its mission within the limitation of its physical and financial resources.

4. Unit Purpose:

To support all functions of the College in the purchasing of needed goods and services in the most efficient manner to achieve the best products and services at the best price for the purpose intended.

5. Link to Strategic Plan: Goal # D Objective # D.2

6. Proposed completion date: 8/31/00

7. Expected Results:

Improvement of Purchasing Office ability to deal with contracts as well as improve the efficiency of the department in its daily activities.

8. Strategies (Activities Planned):

G. Pursue the need for Communications teams for implementation and follow-up of software systems and the need for a programmer to be assigned to Purchasing to accomplish goals to meet the campus needs in the areas of purchasing, capital asset accountability, warehousing and electronic equipment repairs.

H. Initiate a system to better inform all department of available Surplus Items.

9. Assessment Procedures (how will you measure for results and who is responsible for conduct of this assessment):

- A. Internal Assessment Review
- B. Campus User Assessment Survey
- C. Vendor Assessment Survey

10. Budget Cost Impact, if any (does not assure budget approval):

Personnel	\$ _____	Using Same Personnel
Equipment	_____	Using Same Equipment
Other	<u>500.00</u>	Cost of Supplies
Total	\$ <u>500.00</u>	

11. Use of Assessment Findings (how will you use the findings):

To confirm that we have accomplished the goal and that it has been beneficial to all areas.

12. Signature of Unit Director:

C.A. [Signature]

Date

8/10/99

13. Signature of Dept/Vice/President:

[Signature]

Date

