

Monterey County Contracts & Purchasing Academy- Executive Summary

Overview:

Development of an internal Contracts & Purchasing Academy geared towards improving the knowledge and skill set of County employees engaged in the contracts & purchasing process.

Background Information:

In early December 2012 the Monterey County Board of Supervisors held their annual Department Head Workshop and Strategic Initiatives planning session. The outcome of the session was an overwhelming and unanimous expressed common interest in improving the County's contracting process. The County Administrative Office was given the task and immediately assigned an internal Management Analyst to begin an internal review and analysis of its existing contracts & purchasing procedures and policies to identify those areas in need of improvement. In late 2013, the findings of the internal review was delivered to the Board of Supervisors and upon a unanimous vote by the board, the board gave approval to hire and engage the support of an outside consultant to assist the County with the development of a Contracts & Purchasing Academy. The Monterey County Board of Supervisors and twenty-seven (27) County Department Heads agreed that improving the County's contracts and purchasing process was a top priority. To support this strategy the Monterey County Board of Supervisors approved the development of an internal Contracts & Purchasing Academy, along with the implementation of a Contract Tracking System.

The Contracts & Purchasing Development Team proudly launched its first Cohort #1 on September 22, 2014 and graduated its first successful class on October 10, 2014. Since the implementation and successful release and completion of the first Contracts & Purchasing Academy cohort, we've successfully graduated four (4) additional classes with a total of 125 graduating participants.

NEED FOR THE PROGRAM:

In late 2013, the Monterey County Board of Supervisors and twenty-seven (27) Department Heads agreed that improving the County's contracts and purchasing process was a top priority. To support this priority the County engaged the assistance of an outside consultant to assist with the development of the County's Contracts & Purchasing Academy. The academy is led by two (2) internal instructors from within the County's Contracts & Purchasing Division.

The Academy provides County staff the processes, methods, tools, and skills for best contracts and purchasing practice.

DESCRIPTION OF THE PROGRAM:

Contracts & Purchasing Academy Overview:

The Contracts & Purchasing Academy is a three week Academy that focuses on the mechanics and arts of contract creation, entry and life cycle management for the County's contract and procurement process. The Academy entails:

- Six Instructor-Led Lessons (ILT) taught by internal subject matter experts (SMEs) with each lesson no longer than 4 hours in duration.
- Seven 30-40 minute e-learning lessons delivered to learners through the Learning and Development Network (LDN).
- Alignment with nationally recognized professional certifications (awarded through third-party standardized examinations).
- Two Structured on-the-Job Trainings (S-OJT).

The Contracts & Purchasing Academy Goals:

Minimize:

- Number of internal customer complaints
- Number of bid protests
- Number of change orders for services/goods provided outside of the original scope of work
- Risk of litigation due to process errors and unfavorable contract language

Increase:

- Productivity and efficiency throughout the contracts & Purchasing life cycle
- Consistency of contracts and related documents across Monterey County’s twenty-seven (27) departments, agencies and offices
- Likelihood of favorable pricing and terms in contracts
- Contract compliance with regulations and statutes

Creation of Standard Processes:

With the creation of the academy came the creation of newly developed Standard Operating Procedures (SOP’s), which were developed to provide the participants with step-by-step instructions on how to respond to specific contracts and purchasing tasks so that participants can perform standard procedures on-the-job. The development team and instructors also created resources, such as job aids and checklists to assist and help the participants to complete various on-the-job tasks and to assist them in the successful completion of the academy.

We are currently in the process of finalizing the development of five (5) On-the-Job-Training (OJT) activities that will engage the participants even further in practicing and developing their skills on-the-job, such as writing specifications, writing amendments, and negotiating improved and more favorable terms and conditions.

Project Point of Contact:

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Project Cost:

Phase 1	\$79,704.00
Phase 2	\$95,256.00
Phase 3	\$91,368.00
Total	\$266,328.00