

**Monterey County  
Contracts & Purchasing Academy  
Status Report – July 22, 2014**



## BRIEF OVERVIEW

- ❖ December 2012 Board of Supervisors held a Department Head Workshop and Strategic Initiatives planning session.

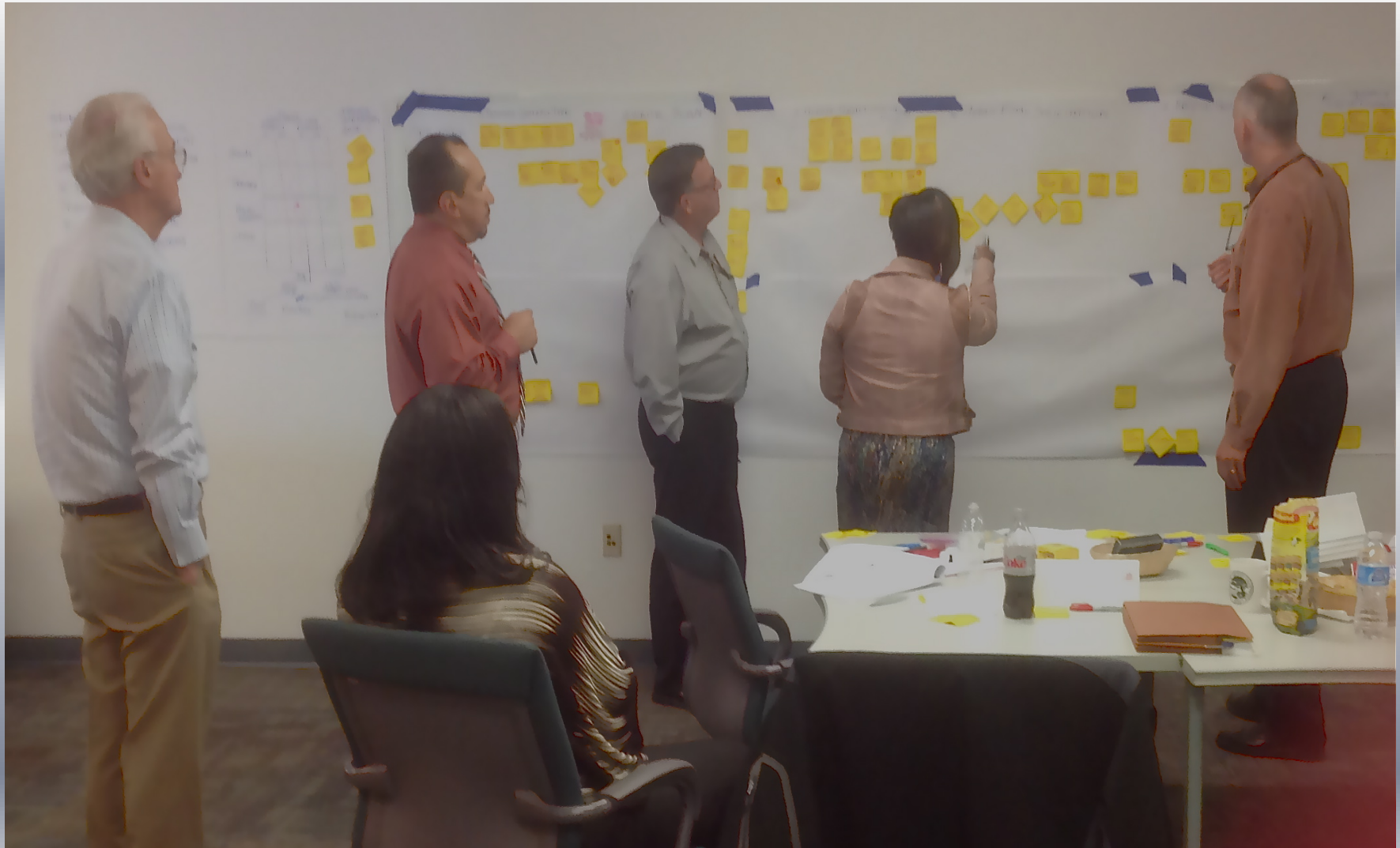
The outcome:

- *Departments expressed common interest in improving the County contracting process.*
- ❖ December 2013 Board of Supervisors approved the development of a Contract Academy and the implementation of a Contract Tracking System.

Outcomes:

- *Collaboration across specializations*
- *Development of Contract Academy & Contract Tracking System*

# “Project Team”



# Organizational Objectives

Category	Need
Compliance	1. Increase contract compliance with regulatory statutes.
Efficiency	2. Increase productivity and efficiency throughout the contract and purchasing lifecycle. 3. Minimize the number of change orders for out-of-scope work. 4. Minimize the number of renewable or multi-year agreements that expire prior to completing an amendment.
Value	5. Increase the likelihood of more favorable pricing and terms in agreements.
Risk	6. Minimize the number of bid protests. 7. Minimize the risk of litigation due to process errors and unfavorable contract language. 8. Minimize number and amount of insurance claims.
Satisfaction	9. Minimize the number of internal customer complaints.

# Instruction Elements

The course is designed to take four (4) weeks to complete. The Academy consists of the following teaching components:

- ✓ Five (5) Instructor lead Training Courses
- ✓ Five (5) Individual E-learning Modules
- ✓ Final On-The Job Training Course

Each level of instruction will contain a Post-Test.

Certification will be issued upon the completion of the Academy.

# Benefits of Implementation

- Defined Roles & Responsibilities for processing contracts County wide
- Collaboration between originating and approving departments
- Written Standard Operating Procedures
- Reference Documents
- Comprehensive Training Academy
- Contract Tracking System
- Overall process improvements and performance measures

# Performance Improvements

- Ongoing process improvements
- Ongoing County wide Training
- Improved Written Scope of Work
- Improved Negotiated Contracts
- Reduction in re-work (rejections)
- Reduced Risk
- Reduction in the number of amendments
- Over-All Contract Management

# Questions