



County of Monterey

Board of Supervisors
Chambers
168 W. Alisal St., 1st Floor
Salinas, CA 93901

Legislation Details (With Board Report)

File #: 15-0320 **Name:** Contracts & Purchasing Academy Status Report - Apr 2015
Type: General Agenda Item **Status:** Filed
File created: 4/2/2015 **In control:** Board of Supervisors
On agenda: 4/14/2015 **Final action:** 4/14/2015
Title: Receive a status report on the County's Contracts & Purchasing Academy and process improvements.

Sponsors:

Indexes:

Code sections:

Attachments: 1. Board Report, 2. Exhibit A - Contracts and Purchasing Academy status report - Apr 2015, 3. Completed Board Order

| Date | Ver. | Action By | Action | Result |
|-----------|------|----------------------|--------------------|--------|
| 4/14/2015 | 1 | Board of Supervisors | received and filed | Pass |

Receive a status report on the County's Contracts & Purchasing Academy and process improvements.

RECOMMENDATION:

It is recommended that the Board of Supervisors Receive a status report on the County's Contracts & Purchasing Academy and process improvements.

SUMMARY/DISCUSSION:

On December 2012, the Board of Supervisors along with County Department Heads collaborated in a one-day workshop to develop Strategic Initiatives for the County of Monterey. During the workshop, departments expressed the need to improve the internal processing and tracking methods currently in place with regards to the County's contract process. Subsequently, a group was formed consisting of members from eight departments including the County Administrative Office (CAO) to examine and make recommendations to improve the existing processes.

The CAO - Budget and Analysis' staff presented the recommendations to the Board on December 3, 2013. The Board approved the development and implementation of a Contract Processing Workflow Tracking System (RQN), which was tested and vetted through multiple users in a test environment and went live on July 1, 2014. In addition, the Board approved the creation of a Contracts & Purchasing Academy (C&PA) in order to improve and create greater efficiency in the contract development and management process.

On February 25, 2014, the Board approved an Agreement with Darryl L. Sink & Associates, Inc. (DSA), for the development of the Monterey County Contracts & Purchasing Academy. The development of the academy focused on creating solutions to assist in resolving high-level organizational needs such as: increasing productivity and efficiency throughout the contract and purchasing lifecycle; increasing the consistency of contracts and related documents across the County's twenty-seven departments/agencies; minimizing the development and approval processing time for contracts; and increasing the likelihood of more favorable pricing and terms in countywide contracts. The development of the C&PA also identified the need to create and implement Standard Operating Procedures (SOP's) to assist staff in the development of contracts in a more formal and consistent manner. In addition, the development of the C&PA also identified the need to create new

processes and procedures to assist County employees in building the necessary skills and knowledge required for the development and accountability of the contract process.

The C&PA has been successfully launched and is preparing to begin its 6th Cohort this month. The Contracts & Purchasing staff has successfully completed 5 Cohorts graduating a total of 123 participants since the release of our first pilot session on August 4, 2014.

OTHER AGENCY INVOLVEMENT:

This has been a countywide collaborative process.

FINANCING:

The required funding for this project was previously approved by the Board at its regularly scheduled meeting on February 25, 2014.

Prepared by:

Approved by:

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Attachment: Exhibit A- Power Point Presentation providing updated information about the Contracts & Purchasing Academy